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CONSUMER TRENDS AND MARKETS ABROAD
DECEMBER 1986 VOLUME 5 NUMBER 12

International Demographics

Trends & Opportunities Abroad, 1987

an annual special publication of International Demographics

Up-to-date information on how consumers are changing in our top fifty trading partners

Trend analysis by country cluster

Population growth from 1970 to 1995

Population gains and losses by age groups

Trends & Opportunities Abroad, 1987

an annual special publication of International Demographics

by Denise Rusoff
& Doris Walsh

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A Country Cluster Overview

Lumping the world's nations into the two categories of "developing" and "developed" no longer works. The current dynamics of global demographics and economics increasingly point out how developing and developed countries differ within these two broad groupings.

To better understand the consumer market potential of today's world, International Demographics clusters the world's 150 largest countries based on their demographic and socioeconomic characteristics. The names of the five clusters--The Dependents, The Seekers, The Climbers, The Ultimate Consumers, and The Rocking Chairs--help identify the kind of consumer markets the countries represent. The clusters give market researchers a quick way of targeting potential world markets for further research effort.

The 50 countries included in this year's volume are considered potential markets. They are organized by cluster. Within each cluster, they are listed alphabetically. All data cited are the most current numbers available to International Demographics. All population estimates are the latest projections by the Center for International Research, U.S. Census Bureau. For a list of all sources used, see the appendix at the back of this volume. It is important to note that projections are not predictions but rather the best estimates of what may occur in the future.

For a listing of where all of the other countries of the world fit into the International Demographics clusters, see the appendix at the back of this volume. Only demographic and socioeconomic indicators are used to cluster countries. Other considerations, such as the political climate or the inflation rate, are not taken into account.

HOW POPULATION TRENDS AFFECT MARKETS

Population trends are powerful movers and shakers.

Population trends are powerful movers and shakers. Those of the next 14 years will change existing markets, shaking out new markets with different characteristics. For Seeker and Climber countries, current and anticipated growth in populations and income mean expanding markets far into the future. For Ultimate Consumer and Rocking Chair countries, increasingly sophisticated tastes and the needs of the aging will fuel the market. For Dependent countries--the poorest part of the world economy--only intensified efforts by the countries themselves and greater assistance from the international development community can pull these countries up in the face of the relentless demographic pressure of skyrocketing population growth.

The sheer size of the market in Seeker and Climber countries is enough to indicate increasing consumer demand. Add to that the predominance of youth and the relentless rural-to-urban shift, and it's easy to see that demand will center on consumer durables for beginning families as the large proportions of youth enter their prime spending years of 15 to 64 years of age. Construction, sanitation, power, telecommunications, and transport are expected to boom as youth add pressure to urban job markets and housing.

Slowed or stagnated growth in the rapidly aging Ultimate Consumer and Rocking Chair countries tells a totally different story. Some Rocking Chair countries such as West Germany are already experiencing natural decrease--more deaths than births. Market growth in the Ultimate Consumer and Rocking Chair countries is tuned to the increasingly sophisticated tastes and needs of the elderly rather than to an increase in numbers.

FOUR DEMOGRAPHIC FACTORS SHOW MARKET POTENTIAL

Four demographic factors help identify market potential--the average annual population growth rate, the average number of lifetime births per woman, the status of women, and urbanization.

Countries not presently considered good potential markets look like this: they are growing very rapidly at an average annual population growth rate of about 2.5 percent or more. What's more, they will continue to do so, fueled by a high fertility rate of five or more lifetime births per woman. The status of women is low, with low labor force participation rates and low educational attainment. The urban population is concentrated in one city which often holds from one-fourth to one-third of the country's entire population.

In contrast, countries with good market potential are growing more slowly, at a rate of 1.5 percent to 2.5 percent a year. They will continue to grow, but fertility is under control, with women bearing 2.6 to 5 children in their lifetimes. The status of women is improving, with increasing numbers entering the labor force and gaining higher educations. Urbanization is spread throughout the country with several large cities instead of one large mega-city.

Countries with mature markets are growing very slowly or are close to stabilizing their populations. Only a few are actually declining in population. They are growing at an average annual rate of under 1.5 percent. Women bear 2.5 children or less in their lifetimes, or around the number of births a population needs to just reproduce itself--2.1 lifetime births per woman.

Countries with mature markets are growing very slowly or are close to stabilizing their populations.

THE DEPENDENTS

About 15 percent of the world's population--730 million people--live in The Dependents. The cluster includes 55 countries, two-thirds of which are in Africa. Nine of the countries are in Asia, six in the Mideast, and three in Latin America.

Dependent countries rely primarily on others for food supplies, for professional assistance in building infrastructure, and for educating their youth, especially at the higher levels. Although these countries are making efforts to improve health and education, to slow population growth, to upgrade the status of women, and to increase access to family planning information and supplies, they still have a long haul ahead of them.

Women in these countries commonly bear seven or eight children during their lifetimes. Infant mortality rates are high, due primarily to lack of adequate health care. To compensate for these high mortality rates, women bear many children, playing catch-up ball in an effort to secure their old age and increase the family labor

THE DEPENDENTS

force. Population growth rates are moderate, however, even though fertility is high, because so many infants die.

Another result of high infant mortality is a lowered median age for the populations of Dependent countries. Median age hovers around 18 to 20. Once infant mortality rates are controlled, population growth in these countries will skyrocket.

Most of the Dependent countries are predominantly rural, with one or two large cities, no medium-sized cities, and hundreds of small, often tribal, villages. Would-be workers flock to the cities, placing relentless pressure on the limited urban job market and housing stock. Due to the agricultural nature of most of the Dependent countries, most women remain in the countryside to work. Women have little access to education and participate only marginally in the wage-earning sector of the economy.

Due to the agricultural nature of most of the Dependent countries, most women remain in the countryside to work.

The middle and upper classes in these countries are made up primarily of government officials, residents who have been educated outside of the country, and expatriates.

THE SEEKERS

This cluster includes 32 countries with a total population of about 1.2 billion people or about 21 percent of the world's population. Thirteen Seeker countries are in Africa, six are in the Mideast, and seven are in Asia. Seeker India's 730 million people make this cluster the second largest of the five. The smallest Seekers are Qatar and Surinam; the largest, India and Indonesia.

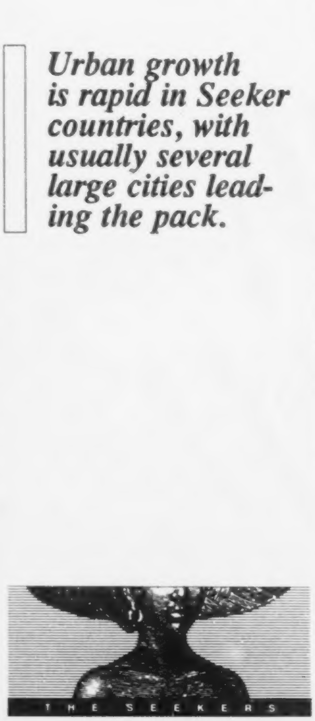
In Seeker countries, women commonly bear five or six children in their lifetimes. Infant mortality rates are below those of the Dependents, allowing women more leeway in considering family planning. The median age is in the high teens or early twenties. Life expectancy is slightly higher than in the Dependents--between age 50 and 60 for most countries. Concerted efforts are being made in many Seeker nations to improve health and education, slow population growth, upgrade the status of women by encouraging them to participate in higher education and the labor force, and increase access to family planning information and supplies. But many still have a long way to go, due to the size of their populations and the fact that many of these policies are still in their infancy, having been started in the 1970s.

Seeker countries are more evenly urbanized than Dependent nations, although some nations like India have large mega-cities coping with enormous demographic pressures. Urban growth is rapid in Seeker countries, with usually several large cities leading the pack. However, attempts are being made in many Seeker nations to increase agricultural production and encourage people to stay down on the farm or to return to rural areas. Indonesia is the most striking example of this kind of policy.

Urban growth is rapid in Seeker countries, with usually several large cities leading the pack.

THE CLIMBERS

Climber countries are on the move, as their name implies. The countries in this cluster are demographically the most important expanding markets in the world today. The middle classes of



Climber countries are growing quickly and great potential exists for sales of new products and services, especially to the large numbers of young adults just entering their prime spending years.

The Climber cluster includes 28 countries with 1.6 billion people or about 38 percent of the world's population. China's over 1 billion adds significant numbers to this cluster. Only one African country appears in this cluster along with six Asian, one Middle Eastern, 15 Latin American, and five European countries. The smallest of the Climbers are Barbados and Martinique. The largest are China and Brazil.

Women in Climber countries typically bear three to five children, although China stands out as a notable exception with births down to about two children per woman. Climber women are much more likely to participate in the workforce in some capacity besides doing farm work and to have attained at least an elementary school education.

> ***The middle classes of Climber countries are growing quickly and great potential exists for sales of new products and services, especially to the large numbers of young adults just entering their prime spending years.***

Because of the speed with which Climber countries have joined the modern world, populations need to be looked at according to age group. Significant differences exist between the young and the old in literacy, educational attainment, professional achievement, and lifestyle choices. Regional differences are also often acute. In many Climber countries, modern cities with large middle classes and rural areas with virtually no services and extreme poverty exist side by side.

Significant improvements in health care have lengthened life expectancies and cut the death and infant mortality rates in Climber countries. Life expectancy is increasing, although the majority of people in Climber countries do not live to age 65. A steady improvement in life expectancy should continue through the 1990s, increasing the demand for such health-related services as dentistry, optometry, and such medical appliances as partial plates, glasses, and contact lenses. In addition, pressure will also be stepped up for providing pensions as people increasingly wonder who will care for them in their old age.

Continued economic growth is all important to still-growing populations of most Climber countries. Economic growth must keep pace with the persistent demographic pressures of already large populations getting bigger. The falling population growth rates of the Climber countries will not take the pressure off most of these countries until the beginning of the next century at the earliest. Large numbers of people will be added before their populations stabilize, even after they attain replacement-level fertility, because of the demographic momentum built into their large and youthful population bases.

This is especially true for the economically troubled Climber countries in Latin America such as Peru and Mexico. And even such economic movers as Climbers Brazil and Venezuela will have to grow at a rapid pace just to tread water. In some Climber countries such as South Korea and Taiwan, however, economic growth far exceeds the rate of population growth, resulting in rising purchasing power.

Rapid population growth has its detractors and backers. Some argue that rapid population growth is a stimulant for economic growth, others see it as a deterrent. No matter which side of the de-

THE CLIMBERS

bate, however, no one doubts that rapidly growing populations do add time constraints to the big task of providing jobs and housing for large groups of young people just entering their prime earning and spending years.

Many of these pressures are felt in the rapidly expanding cities which must make room for youthful job seekers in their formal labor forces, or relegate them to lower-paid jobs in the informal sector. They must also provide housing for youth's newly forming families. Already hard-hit cities include Brazil's Sao Paulo and Rio de Janeiro, Mexico's Mexico City, Peru's Lima, and India's Bombay and Calcutta. Many Climber countries are making concerted efforts to redistribute the population from one or two large cities into other less-populated areas. Investment outside the metropolitan areas is encouraged. Firms willing to locate in medium-sized cities may face better prospects for government approval.

THE ULTIMATE CONSUMERS

This is the cluster most familiar to North American, Japanese, and Western European consumer goods firms. The Ultimate Consumer countries are their main markets.

> ***The combination of smaller families and higher incomes resulting from two paychecks per family gives Ultimate Consumers more discretionary income.***

Thirty-three countries with a total population of about 1 billion people--a fifth of the world's population--fall in this cluster. Twenty-one of them are European countries, two are North American, four are Latin American, five are Asian-Pacific, and one is Middle Eastern. Not surprisingly, no African country is included. Seven Eastern Bloc countries are included in this cluster because of their demographic characteristics, even though their market potential is limited to the West.

Without the need to bear more children to secure their old age, increase the family labor force, or compensate for high mortality, Ultimate Consumer women commonly have two to three children in their lifetimes. Increased educational attainment and socioeconomic development encourage Ultimate Consumer women to participate more in the workforce. The combination of smaller families and higher incomes resulting from two paychecks per family gives Ultimate Consumers more discretionary income.

Educational attainment is high in Ultimate Consumer countries. Almost all children attend school at least until they are 16 years old, and many further their education by attending college or a vocational or technical school.

Both men and women in the Ultimate Consumer countries commonly live to their early or mid-70s. Improvements in life expectancy in the next decade will be slight compared to strides made in Climber countries.

Median age in Ultimate Consumer countries is above 30, and household formation years are peaking. But by the mid-1990s, countries in the Ultimate Consumer cluster will move strongly into middle age, with the median age rising to about 40 years as elderly people represent an increasingly larger proportion of the population.

Services, goods, and jobs are evenly distributed throughout Ultimate Consumer countries. Population shifts occur moderately and often cities and rural areas seesaw from one census to another.

THE ULTIMATE CONSUMERS

THE ROCKING CHAIRS

Rapid population aging is the spectre haunting the four Rocking Chair countries--Denmark, West Germany, Sweden, and the United Kingdom. In all of these countries, the already disproportionately large proportion of those over age 65 will become more so in the near future. Such rapid aging will take its toll as shrinking numbers of workers must pick up the bill for increasing numbers of pensioners.

With only a total population of 131 million, or about 3 percent of the world's population, taken by themselves the Rocking Chairs might not command all that much attention. But because they are positioned at the crest of a very large wave soon to break--the aging of the rest of Europe and North America--how these few countries handle the resultant social tensions attending rapid population aging will be a harbinger of things to come.

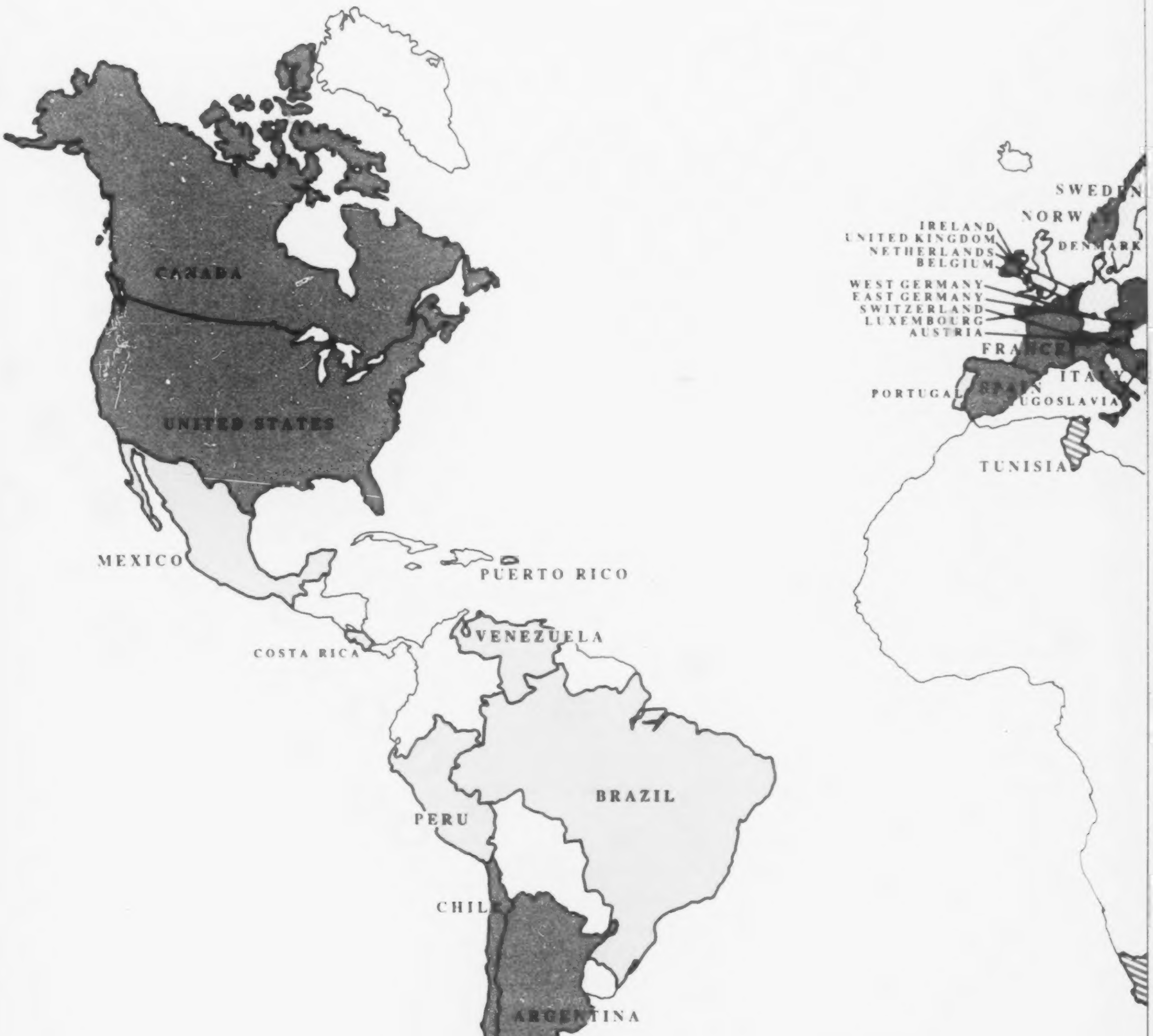
The Rocking Chair countries are positioned at the crest of a very large wave soon to break--the aging of the rest of Europe and North America.

Women of the Rocking Chair countries have fewer than two children each. Couples are not even replacing themselves. Under these circumstances, beefing up sagging population figures can only come through immigration--an unpopular though practical solution. The population of these countries will remain fairly stable or decrease slightly with fewer and fewer babies being born. As a result, the proportion of the elderly relative to youth will increase significantly.

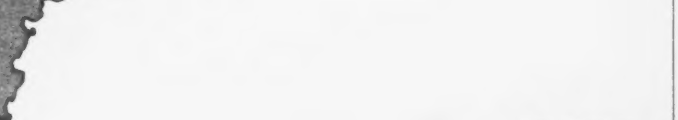
Changes lie ahead in the purchasing behavior of mature households as the more educated, more moneyed middle-aged people enter the ranks of the elderly. Factors such as whether or not persons must themselves finance their retirement, the need for sheltered housing, health care costs, and the level of government social security and support service expenditure need to be considered when looking at these markets.

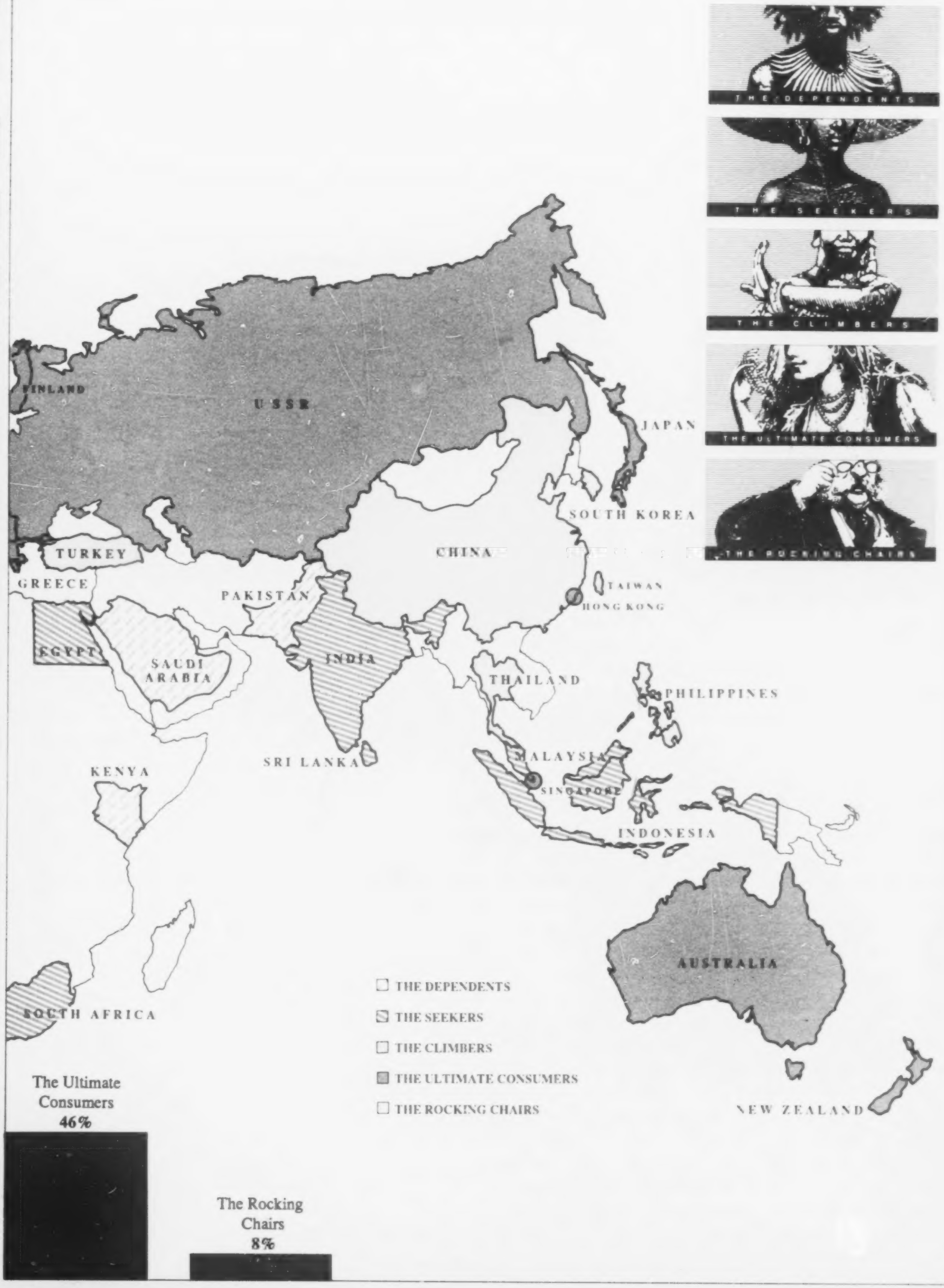
THE ROCKING CHAIRS

The Country Clusters--where are they?


CANADA
UNITED STATES
MEXICO
PUERTO RICO
COSTA RICA
VENEZUELA
PERU
BRAZIL
CHILE
ARGENTINA
SWEDEN
NORWAY
IRELAND
UNITED KINGDOM
NETHERLANDS
BELGIUM
DENMARK
WEST GERMANY
EAST GERMANY
SWITZERLAND
LUXEMBOURG
AUSTRIA
FRANCE
ITALY
PORTUGAL
SPAIN
YUGOSLAVIA
TUNISIA

The Country Clusters--who dominates?




THE DEPENDENTS
THE SEEKERS
THE CLIMBERS
THE ULTIMATE CONSUMERS
THE ROCKING CHAIRS
FINLAND
USSR
JAPAN
SOUTH KOREA
CHINA
TAIWAN
HONG KONG
TURKEY
GREECE
PAKISTAN
EGYPT
SAUDI ARABIA
INDIA
THAILAND
PHILIPPINES
SRI LANKA
MALAYSIA
SINGAPORE
KENYA
INDONESIA
AUSTRALIA
SOUTH AFRICA
NEW ZEALAND
☐ THE DEPENDENTS
▨ THE SEEKERS
☐ THE CLIMBERS
▩ THE ULTIMATE CONSUMERS
☐ THE ROCKING CHAIRS
The Ultimate Consumers
46%
The Rocking Chairs
8%

THE DEPENDENTS

When looking at the four key demographic factors that help identify market potential, The Dependents lose on all counts.

Take Kenya, for example. The total fertility rate--or the average number of children a woman will bear in her lifetime--is well above the 2.6 to 5 children per woman figure considered necessary for a country to be a good potential market. With the average woman bearing about eight children in her lifetime and little prospect of change in the near future, the country shows little promise as a consumer market in this century. Just keeping up with the basic needs of a surging population will strain already limited resources. And Kenya's record-high population growth rate of about 4.2 percent a year is far above the 1.5 to 2.5 percent considered necessary to be classified as a potential market.

Another important demographic factor is a country's pattern of urbanization. Not just percent urban, but size of major cities and how these cities are distributed around the country. A country with good market potential has a city pattern similar to that of a large state in the U.S., with several large cities and many more intermediate-sized cities.

Kenya's urbanization pattern mirrors that of many other Dependent countries, with only one large city housing most of the country's urban population. Kenya's largest city, Nairobi, has about a million people, and its next largest city only half that. Two other cities have more than 100,000 people, but most have 40,000 or fewer people. Fifty-seven percent of Kenya's urban population lives in Nairobi. And with insufficient industry to support the city, it lives off hinterland agriculture and foreign loans.

The status of women also tells a lot about whether a country has good market potential or not. With some exceptions, women in Dependent countries have little access to education and are not an integral part of the labor force except in rural areas where they work in agriculture. The economies of the Dependents are mainly agricultural, as compared with the largely industrial economies of the Climbers and the service economies of the Ultimate Consumers. Most of the Dependents are still struggling to become self-sufficient in food.

MEDIAN AGE HIGHER THAN IN SEEKER NATIONS

Dependent countries usually have high infant mortality rates due to a lack of basic sanitation and the large percentage of rural inhabitants with little or no access to modern medical facilities or supplies. Women typically play catch-up ball by bearing many children in an effort to secure their old age and increase the family labor force.

Because these infant mortality rates are high, the median age in Dependent nations is not as low as in the Seeker and Climber nations. It is not unusual for half the population of a Dependent nation to be over age 18 or age 20, whereas many Seeker countries have a median age of about 15, meaning that half of their populations are under age 15.

TWO-THIRDS OF DEPENDENT NATIONS ARE AFRICAN

With high birthrates, only marginal lowering of fertility rates, and declining death rates, Dependent nations--most of which are located in Africa--have the demographic potential to grow as projected. But all projections about Dependent nations need to be carefully considered in light of recent social, political, and economic trends in these countries. Projected increases for Dependent nations need to be tempered by realistic appraisals of how their populations are responding to demographic pressures. Africa's growth may well fall far below the projected mark due to potential declines in fertility in response to mounting demographic pressures and economies unable to cope with supporting their peoples.

Kenya

THE DEPENDENTS

Kenya's record-high population growth rate of about 4.2 percent a year places unrelenting demographic pressures on this Dependent nation. Its population of 21 million in 1986 is slated to quadruple to 83 million by 2025. Lowered mortality rates and sustained high fertility rates--or the average number of lifetime births per woman--are the culprits. Kenyan women still average about 8 children each. By the time Kenya's population growth is expected to stabilize, the country will have almost 6 times its present population.

Kenya's population grew fully 41 percent between the censuses of 1969 and 1979, and its growth rate is increasing. Kenya's population growth rate climbed in the 1960s, 1970s, and 1980s as mortality declined--due to the introduction of modern medicine--and fertility remained high. The death rate dropped from 27 deaths per 1,000 in the early 1950s to 14 per 1,000 in the early 1980s. However, the average number of lifetime births per woman remained high, hovering around 8 births per woman.

Such high fertility rates have resulted in an extremely youthful population. About 53 percent of Kenyans are under age 15. What this means now is a high ratio of dependent children to producers. Down the road, it means surging population growth as these children become adults and move into their childbearing years.

What's more, no relief is within sight. Fertility change has been negligible, even though the government has a family planning program. However, some change has been noted in the desired family size by ever-married women, which dropped by one child, from 7.2 children in 1978 to 6.2 children in 1984. Also the percentage of currently married women using contraceptives went from 7 percent to 17 percent during the same period.

By the time Kenya's population growth is expected to stabilize, the country will have almost 6 times its present population.

Experts foresee fertility dropping as women become better educated. This holds out some hope for Kenya--a country that has seen primary school enrollments jump from 50 percent to 95 percent for girls between 1970 and 1980. The Kenya Contraceptive Prevalence Survey of 1984 found that family-size desires and fertility are lower and contraceptive use higher among better educated women. Thirty-six percent of the surveyed Kenyan women who were married and who had nine or more years of schooling were currently using contraceptives, as compared to only 19 percent of their counterparts who had only 5 to 8 years of schooling.

KENYA REMAINS LARGELY RURAL

About 83 percent of Kenyans live in rural areas. Urban areas are defined as those with

*See the September 1982 issue of **International Demographics** for in-depth consumer information about Kenya. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

more than 2,000 inhabitants. Because Kenya remains largely rural, traditional concepts of employment and labor force participation make no sense when looking at Kenya.

About two-thirds of Kenya's population worked on farms in 1980. Only 12 percent of the population aged 15 and over were employed in wage labor, or about 1 million people, as compared to only about 700,000 in 1971. One-quarter of all wage earners were employed in the agricultural and forestry industry in 1980, and almost half of those jobs were on coffee or tea plantations. Thirty-six percent of earners worked in community, social, and personal services, three-quarters of which were public-sector jobs.

Manufacturing employed 14 percent of all earners in 1980. Construction, wholesale and retail trade, and transportation and communications each accounted for about 6 percent of employment. Mining, electricity and water, and financial services accounted for the remaining 5 percent of the modern-sector economy.

Construction, the fastest growing industry between 1975 and 1980, grew 51 percent. Financial services, including insurance, real estate, and business services, grew 48 percent; manufacturing, 37 percent. Mining and quarrying were down, however, declining by 26 percent.

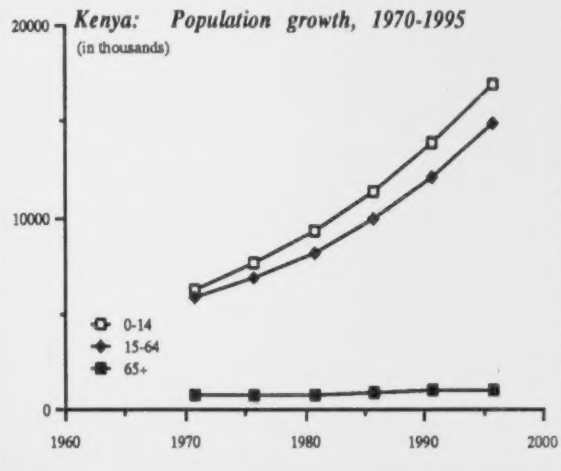
In 1979, Kenyans working in non-agricultural jobs earned an average of $159 a month; manufacturing, $148; mining and quarrying, $138; construction, $219; and agriculture (including wages and room and board) $56.

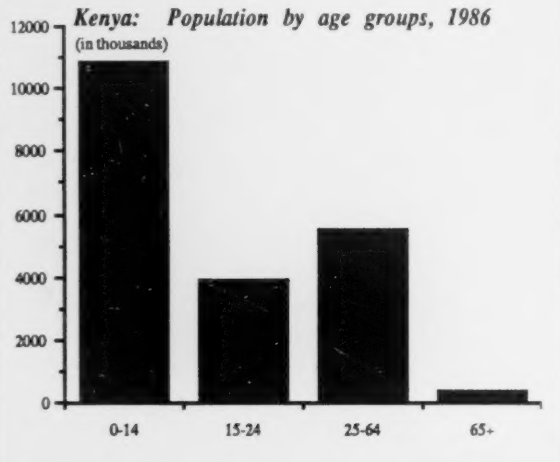
WHAT LIES AHEAD

Kenya is a country of great potential at the crossroads. Continuing on the path of relative stability, freedom, and increasing prosperity that marked the country's post-independence experience under President Jomo Kenyatta will require extraordinary leadership and an enlightened management of the economy.

In the late 1970s, soaring world prices for tea and coffee--important Kenyan exports--made for an optimistic future. However, the more recent decline in prices has put Kenya in an awkward balance-of-payments position. Development plans made only a few years ago now appear financially unfeasible. The guidelines for the next five years--1983 to 1988--stress conservative fiscal policy and the need to live within constraints on foreign exchange and domestic resources.

The government is interested in improving agricultural production. It will emphasize technologies that increase the number of productive employment opportunities for unskilled labor while conserving capital, especially foreign exchange. Public works will emphasize small-scale local projects. The private sector will most likely play a vigorous role in manufacturing and commercial activities. Demand for consumer goods will be strong, but foreign-exchange shortages may constrain imports.





take a quick look at Kenya

POPULATION

Total population (estimated 1986) | **21,453,118**
Rate of population growth (percent) | **4.22**
Lifetime births per woman (total fertility rate) | **8.01**
Birthrate (births per 1,000) | **52.08**
Death rate (deaths per 1,000) | **9.87**
Population under 15 (percent) | **51.5**
Population aged 65 plus (percent) | **2.1**
Median age | **14.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **41.4**
Number of persons per square kilometer | **35**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **60/58/62**
Infant mortality rate (number per 1,000 live births) | **76**
Population per physician/per nursing person | **7,540/990**
Daily calorie supply per capita (calories per person per day) | **1,919**

Education

Percent literate (male/female, total percentage) | **66/35, 50**
Number enrolled in secondary education as percentage of age group (male/female) | **23/15**
Number enrolled in higher education as percentage of population aged 20-24 | **1**

Labor force

Percent of labor force in agriculture/industry/services | **81/7/12**
Percentage of population of working age (aged 15-64) | **46.4**
Age-dependency ratio | **119**

STATUS OF WOMEN

Labor force participation rate (percent) | **47**
Number enrolled in secondary education as percentage of age group | **15**
Percent of women aged 15-49 using contraceptives | **17**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **20/80**

Population of major metropolitan areas

city name | **Nairobi 850,000**

city name | **Mombasa 400,000**

Average annual growth in cities of 20,000 or more (percent) | **8.1**

Average annual growth in rural areas (percent) | **3.2**

Rate of total population growth (percent) | **4.2**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$310**

Pakistan

THE DEPENDENTS

Marked by years of rapid growth alternating with periods of virtual stagnation, the Pakistani economy is currently on the upswing. In 1985, government controls to curb inflation and favorable farming conditions brought about a record rise in the GDP of 8.4 percent.

The largest share of the economy belongs to the service industries, accounting for 45.8 percent of the GDP in 1985. Although agriculture grew by a record 9.9 percent in 1985, its share of the GDP declined to 24.7 percent from 27 percent in 1983. Agriculture, the traditional foundation of the economy, is slowly giving way to manufacturing. Manufacturing gained the largest share of the GDP, growing from 20.1 percent in 1983 to 21.1 percent in 1985.

RUNAWAY POPULATION GROWTH

At independence in 1947, Pakistan was home to 32 million people. By 1984, the population had tripled to 93 million, making Pakistan the world's ninth most populous country. Its 3 percent annual population growth rate placed it among the world's fastest growing countries.

Pakistan's 1986 population of 101.7 million people is expected to grow to 145.2 million in the year 2000 and 242.1 million in 2020, due to the expectation of sustained high fertility and declining mortality. The average Pakistani woman in 1986 will bear 6.6 children in her lifetime. This figure is projected to decline to about 5.7 lifetime births per woman in the year 2000 and to 4.2 lifetime births in 2020.

Pakistan belongs to the group of less-developed countries in which fertility remains high up to the year 2000 and mortality continues to decline gradually, keeping the proportion of the population aged 60 and over low during the whole period and the proportion of the young increasing up to the year 2000, after which it slowly begins to shrink.

> ***Pakistan's migrant worker remittances are bigger than the country's total merchandise exports.***

Pakistan's population is currently youthful and will remain that way well into the 21st century due to these differential rates of fertility and mortality. In 1986, 43 percent of its population was under age 15. Another 19 percent was between the ages of 15 and 24. Only 4.1 percent were aged 65 and over, as life expectancy is very low--55 years for men and 54 years for women. The proportion of youth aged under 15 will remain high past the year 2000, decreasing only slightly to 41.6 percent of the population in 1995 and 39.2 percent in the year 2000. The proportion of those 65 and over will remain relatively unchanged, hovering around 5.2 percent of the population past the year 2000.

*See the July 1986 issue of **International Demographics** for in-depth consumer information about Pakistan.*
Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

RAPIDLY EXPANDING WORKFORCE

The rapid growth of the workforce--from 10.4 million in 1951 to 28.6 million in 1986--mirrors the high population growth rate and reflects the tendency of school-age children to work. In 1985, an estimated 21 percent of all 10-to-14-year-olds and 40 percent of all 15-to-19-year-olds worked.

Agriculture, including forestry and fishing, employs the vast majority of the country's labor force, although in increasingly smaller proportions. In 1983, about 55 percent of all workers were involved in agricultural activities compared to 57 percent in 1972. The proportion of the labor force in mining and manufacturing grew slowly from 12.9 percent in 1972 to 13.7 percent in 1983, in the trade industry from 10 percent to 11 percent, in construction from 3.4 percent to 4.2 percent and in public utilities from 0.4 percent to 0.5 percent. Those working in the transport and communications sector remained at 4.7 percent, while the proportion of workers in other services declined from 11.2 to 10.3 percent.

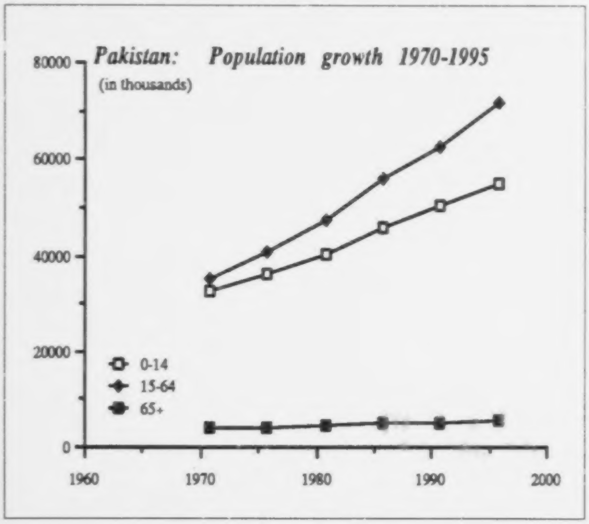
PAKISTANI MIGRANT WORKERS BRING HOME OVER 40 PERCENT OF PAKISTAN'S FOREIGN EXCHANGE

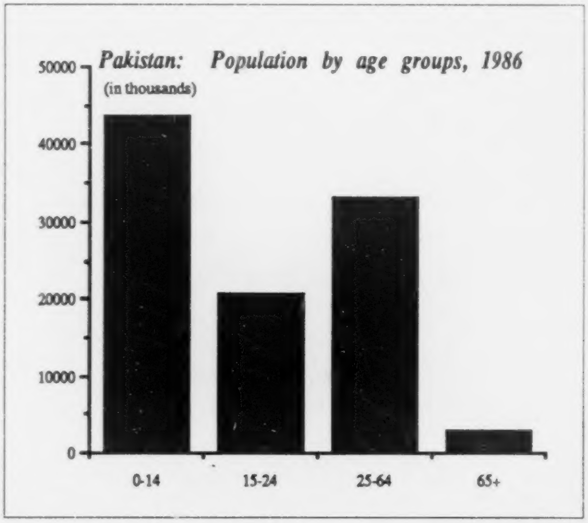
Pakistan's migrant worker remittances are bigger than the country's total merchandise exports. In 1985, workers sent home a little less than $3 billion. Most Pakistanis leave Pakistan for the lucrative job market of the Middle East. However, falling oil revenues are speeding the departure of migrants from the Persian Gulf and Saudi Arabia and reducing the flow of new migrants from Asia to the Middle East. And many of those who remain have taken pay cuts.

PAKISTANI WOMEN NO BETTER OFF

Pakistani women get less food, clothing, and care than their male counterparts. They even die younger. And, while the proportion of the workforces of most developing countries made up of women increases, the opposite is true for Pakistan. Women made up 8 percent of the workforce in 1977; today, they only account for 5 percent of the workforce.

Although some gains have been made in education--the percentage of literate women has doubled since 1947--large disparities between men's and women's educational attainment still exist. In all provinces, women have lower literacy rates than men at all age levels. In 1981, 86.3 percent of women aged 10 and over were illiterate, compared to 68.2 percent of men. And in 1985, only 7 percent of young women were enrolled in secondary school, as compared with 27 percent of young men.





take a quick look at Pakistan

POPULATION

Total population (estimated 1986) | **101,768,961**
Rate of population growth (percent) | **2.76**
Lifetime births per woman (total fertility rate) | **6.68**
Birthrate (births per 1,000) | **43.45**
Death rate (deaths per 1,000) | **14.91**
Population under 15 (percent) | **42.9**
Population aged 65 plus (percent) | **4.1**
Median age | **17.6**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **45.3**
Number of persons per square kilometer | **126**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **53/54**
Infant mortality rate (number per 1,000 live births) | **123.3**
Population per physician/per nursing person | **3,320/5,870**
Daily calorie supply per capita (calories per person per day) | **2,205**

Education

Percent literate (male/female, total percentage) | **30/11, 21**
Number enrolled in secondary education as percentage of age group (male/female) | **27/7**
Number enrolled in higher education as percentage of population aged 20-24 | **2**

Labor force

Percent of labor force in agriculture/industry/services | **55/16/30**
Percentage of population of working age (aged 15-64) | **53**
Age-dependency ratio | **88.5**

STATUS OF WOMEN

Labor force participation rate (percent) | **7.2**
Number enrolled in secondary education as percentage of age group | **7**
Percent of women aged 15-49 using contraceptives | **11**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **30/70**
Population of major metropolitan areas
    city name | **Karachi 5,103,000**
    city name | **Lahore 2,922,000**
Average annual growth in cities of 20,000 or more (percent) | **4.3**
Average annual growth in rural areas (percent) | **2.6**
Rate of total population growth (percent) | **2.76**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$380**

Saudi Arabia

THE DEPENDENTS

Cuts in the price and production of oil since 1982 have signaled change in Saudi Arabia. Oil money, which is mostly controlled by the government, is no longer flowing like it used to. Jobs are less abundant and government subsidies are being cut.

Those used to life on the dole with secure incomes and cheap foreign labor face a changing future. The government looks to diversify the economy and cut its dependence on oil. About 20 percent of Saudi GDP comes from the private sector. It is likely, however, that half of it is dependent on demand stemming from oil revenue.

For the most part, while increasingly richer, Saudis have continued to live at home with the reserve religion and tradition expects of them. Some point to the excesses of bored youth prone to drink and drugs, but outward signs of these behaviors are nonexistent. Saudi society is still very much an Islamic one.

POPULATION COUNT UNRELIABLE

Knowing exactly how many Saudis there are is not easy. Results of the last official census in 1974 are generally acknowledged to be unreliable. However, the U.S. Census Bureau's Center for International Research estimates that there were 14.2 million Saudis in 1986. Saudi women commonly bear 6 or 7 children in their lifetimes. Rapidly dropping infant mortality rates--from 174 per 1,000 in the early 1960s to 86 per 1,000 in the 1980s--combined with sustained high fertility will lead to rapid population growth. By the year 2000, the population is expected to reach 18.8 million; by 2020, 24.7 million.

Saudi Arabia has a youthful population, and it will remain so well into the 21st century. In 1986, just under 37 percent of Saudis were under age 15. The median age of about 18.5 years will remain young, increasing slightly to 20 years by 2010.

WOMEN UNDER SAUDI ARABIAN ISLAM

In Saudi Arabia, women cannot work alongside men. This effectively cuts their participation rates as well as their access to a range of jobs. Women do not go out except to visit friends and relatives and to shop. Once outside, they are covered from head to toe. Co-education is out of the question.

> ***Most educated Saudi women do not perceive themselves as second-class citizens even though they must wear a veil in public, dine in separate quarters, and are not permitted to drive.***

But, most educated Saudi women do not perceive themselves as second-class citizens even though they must wear a veil in public, dine in separate quarters, and are not permitted to drive. The opening of women's banks, operated by women for women, created controversy. But, these new banks also received large numbers of applications from prospective women employees. In Islam, a women controls her own wealth, even after she is married. The introduction of these special banks permits Saudi women to fully exercise these rights.

YOUNG SAUDIS PREFER GOVERNMENT TO PRIVATE SECTOR JOBS

Two Saudi jokes tell a lot about Saudi

*See the May 1983 issue of **International Demographics** for in-depth consumer information about Saudi Arabia. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

attitudes towards work. One joke goes: "Have you heard that the Saudis have declared war on the Israelis? The Koreans have got the contract." The other goes: "There are too many chiefs, so they have to import Indians."

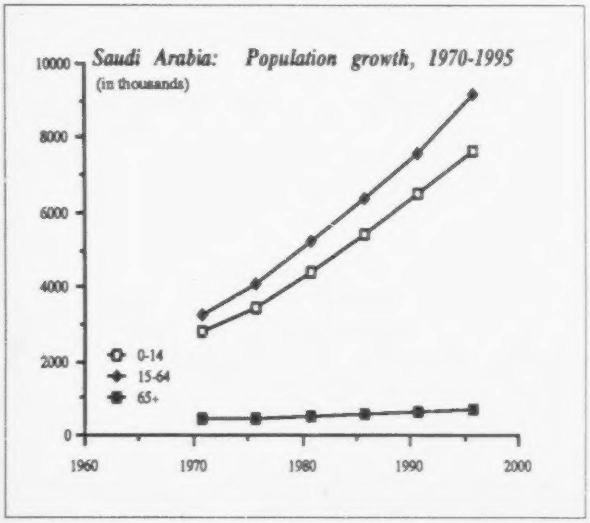
Foreign observers and government officials alike are increasingly discussing the reluctance of young Saudis to take up the jobs as clerks, technicians, and laborers that migrant workers have been imported to do. Youth in the newly- trained and well-educated Saudi workforce for the most part prefer government jobs rather than those in the private sector. And for those that do, the private sector often prefers outsiders with more experience.

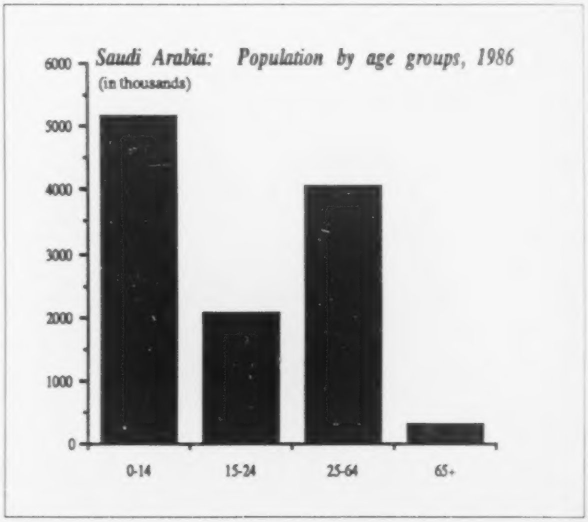
Attitudes on both sides of the fence add up to problems for a government attempting to send imported labor home in expectation that local labor will take its place.

VOCATIONAL TRAINING STRESSED TO ALLEVIATE DEPENDENCE ON FOREIGN LABOR

The Saudi government is making concerted efforts to equip the Kingdom with trained indigenous manpower to run the huge industrial complexes under construction and manage the associated commercial ventures which could transform Saudi Arabia into a world power. The Saudi government is placing a high priority on vocational schooling and planning to restrict the growth of universities as a means of boosting vocational expertise. It also offers a monthly stipend of $300 for students attending a university, plus an 80 percent food allowance and a 75 percent book allowance. For university students coming from outside urban centers, free accommodations are also provided.

So far, Saudi efforts have been fruitful. Primary or basic education enrolled 325,000 boys and 537,000 girls between the ages of 5 and 9 in 1980. At the intermediary level in 1980, 165,000 boys and 80,000 girls were in school. General, secondary education is a ten-year program culminating with a high-school diploma. In 1980, there were 65,000 men and 29,000 women enrolled. Two-to-four-year vocational institutes have 9,700 students attending special instruction in regular programs and 9,400 students in evening programs learning to be air conditioning and car mechanics, carpenters, electricians, welders, metal workers, printers, bookbinders, and radio and television mechanics.





take a quick look at Saudi Arabia

POPULATION

Total population (estimated 1986) | **14,184,837**
Rate of population growth (percent) | **5.04**
Lifetime births per woman (total fertility rate) | **6.98**
Birthrate (births per 1,000) | **38.86**
Death rate (deaths per 1,000) | **7.62**
Population under 15 (percent) | **36.7**
Population aged 65 plus (percent) | **1.8**
Median age | **18.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **45.4**
Number of persons per square kilometer | **5**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **63/62/64**
Infant mortality rate (number per 1,000 live births) | **81.4**
Population per physician/per nursing person | **1,800/730**
Daily calorie supply per capita (calories per person per day) | **3,244**

Education

Percent literate (male/female, total percentage) | **30/2, 16**
Number enrolled in secondary education as percentage of age group (male/female) | **37/24**
Number enrolled in higher education as percentage of population aged 20-24 | **9**

Labor force

Percent of labor force in agriculture/industry/services | **49/14/37**
Percentage of population of working age (aged 15-64) | **61.5**
Age-dependency ratio | **89.5**

STATUS OF WOMEN

Labor force participation rate (percent) | **NA**
Number enrolled in secondary education as percentage of age group | **24**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **72/28**

Population of major metropolitan areas

city name | **Riyadh 666,800**

Average annual growth in cities of 20,000 or more (percent) | **6.1**

Average annual growth in rural areas (percent) | **-0.1**

Rate of total population growth (percent) | **5.0**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$10,530**

THE SEEKERS

Seeker countries are still struggling to improve health and education, slow population growth, and upgrade the status of women. Many are on the right road and have made considerable progress in specific areas. The Seeker countries of India, Indonesia, and Malaysia, for example, in spite of hefty populations and immense difficulties, have achieved substantial progress in agriculture. India now exports grain, and Indonesia is self-sufficient in grain. Seeker countries have already suceeded in lowering their birthrates, although they are still high in comparison to those of Ultimate Consumer or Climber countries. In all Seeker countries, birthrates are expected to fall further.

LOW GNP BUT RELATIVELY AFFLUENT AND SIZEABLE MIDDLE CLASSES

Although GNP per capita for many Seeker countries is low, the sheer numbers of those who are modestly middle class make some Seeker nations good candidates as potential markets. Seeker India's 50 million relatively middle-class citizens, for example, make up a market the size of France's or West Germany's entire population, although with different buying potential.

While purchasing power in many Seeker countries is rising slowly, in others it is falling. Vast differences exist, for example, between such rising Seekers as Malaysia and Indonesia--in which GDP grew at 7.7 percent annually between 1970 and 1982--and such stagnating Seekers as Egypt and Tunisia. Even rising stars Malaysia and Indonesia have experienced recent setbacks with GDP growth projected to be flat for Indonesia and 1.8 percent in 1987 for Malaysia.

INDIA FORGES AHEAD

India is a consistent Seeker favorite, however, with GDP growing at about 4 percent annually in 1985 and 1986, with equal growth projected for 1987. Many analysts point to India's fast-growing industrial sector as an indicator of India's commitment to take its place in the global marketplace and its potential for doing so. Analysts see India's GNP topping $500 billion by the turn of the century.

Another good sign is the broad base of support Gandhi's economic policies enjoy. Even the half of Indian states under opposition rule support pro-business, multi-national policies.

GRADUAL AGING AFTER THE YEAR 2000

The populations of Seeker countries are young and are slated to remain that way up to the turn of the century. After the year 2000, these countries are expected to begin aging gradually.

In most Seeker countries both fertility and mortality rates began to decline in the 1950s and 1960s. Yet, women of these countries still commonly bear five or six children in their lifetimes. Concerted efforts to lessen population growth, however, have been stepped up, and fertility rates are expected to fall significantly by the year 2000. The proportions of youth in these countries, therefore, will decrease gradually from about 40 percent of the total current population to around 23 to 25 percent in the year 2020. Ultimate Consumer Singapore, in contrast, is projected to have about 16 percent of its population under age 15 by 2020.

Concurrently, the proportion of those aged 60 and over will remain low to the year 2000 and then increase slowly. By the year 2020, about 13 to 16 percent of Seeker country populations will be over 60. Ultimate Consumer Japan, in comparison, is expected to have 26.5 percent of its population over 60 by 2020.

RAPID URBANIZATION CAUSES CONCERN

The urban populations of Seeker nations in general are growing substantially faster than the total population, with urbanization continuing at a rapid and often accelerating pace. Growth-related problems of such rapid population growth are of major concern to Seeker nations. Yet the relationship between urban growth and overall development differs between many Seeker nations. Jakarta's growth, for example, is seen in a positive light as it releases population pressures on valuable farmland, while Calcutta's and Bombay's surging growth has no such redeeming quality.

To lessen the enormous demographic pressures on urban systems, many Seeker nations are attempting to increase agricultural production and encourage people to remain in rural areas. Some even have made efforts to redistribute the urban populations of their one or two major cities to other urban or rural areas.

Egypt

THE SEEKERS

Egypt is in dire straits. Median income for the employed averages $285 a year. And falling oil prices are sending Egyptian migrant workers back home from the lucrative job markets of the Persian Gulf and Saudi Arabia.The economy is in deep trouble with a foreign debt amounting to $35 billion, of which they can neither repay the principal nor the interest. And the austerity policy recommended by the International Monetary Fund and the World Bank in order to win approval for a postponement of payments has Egyptian leaders in a quandary. Fear of unleashing the forces of the increasingly powerful Islamic fundamentalists has leaders reluctant to raise the price of now heavily subsidized food. Leaders remember all too well the 1977 food riots which took army intervention to control.

RAPID POPULATION GROWTH PRESSURES JOB MARKET AND HOUSING

Egypt's 1986 population of 50.5 million is expected to climb to 71.2 million in the year 2000 and 102.9 million by 2020. The number of lifetime births per Egyptian woman is still high--5.5 in 1986--although down from 6 births per woman in 1977. This trend is expected to continue with average lifetime births per woman dropping to 3.9 in the year 2000 and 2.5--just above replacement level--in 2020. The population growth rate of 2.7 percent in 1986 is expected to fall to 2.2 by the year 2000.These projections, however, do not take into consideration the rising power of Islamic Fundamentalism in Egypt and its effect on reproductive behavior.

Egypt belongs to the group of less developed countries in which fertility remains high up to the year 2000 and mortality continues to decline gradually, in contrast to those in which fertility and mortality both decline after 1950. The proportion of the population aged 65 and over remains very low during the whole period--in Egypt's case hovering around 4.5 percent of the total population. Concurrently, the proportion of the young aged under 15 remains high--in Egypt's case about 40 percent of the total population--and then starts to shrink around the year 2000. Egyptians aged 15 and under are projected to decrease from 40.2 percent of the population in 1990 to about 36 percent of the total population in the year 2000.

> ***In general, Egypt's labor force of 15 million is large and relatively skilled compared with those of other countries in the region.***

MIGRANT WORKERS' REMITTANCES BIGGEST SOURCE OF FOREIGN EXCHANGE

Egypt's migrant workers' remittances are bigger than total merchandise exports. Egypt gleans a reported $4 billion a year from its far-from-home labor force. The rest is smuggled into the country through black market channels.

About 3 million Egyptians migrate to other countries for work. They represent one-sixth of Egypt's total work force. With average

*See the August 1983 issue of **International Demographics** for in-depth consumer information about Egypt. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

work-abroad salaries of $2,000 a year, they triple the earnings of an average Egyptian. Falling oil prices are sending many migrant workers home, however, as Middle East economies contract. The Egyptian government estimates that about 600,000 migrants should come home in 1986.

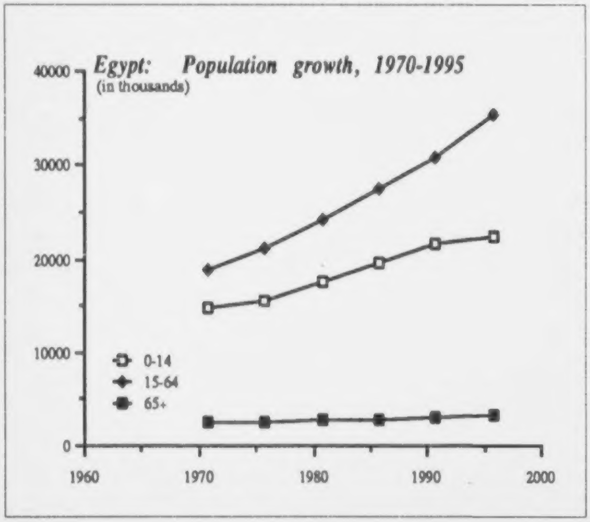
Some experts see this trend as a positive step for Egypt's economy. Keeping skilled labor at home in the face of lucrative offers from abroad pushed up local wages, making domestic industries less competitive. In general, Egypt's labor force of 15 million is large and relatively skilled compared with those of other countries in the region. About 12 million Egyptian men were at work in 1981, or 60 percent of all men. About 48 percent of the labor force works in agriculture, about 18 percent in industry and commerce, and 32 percent in services.

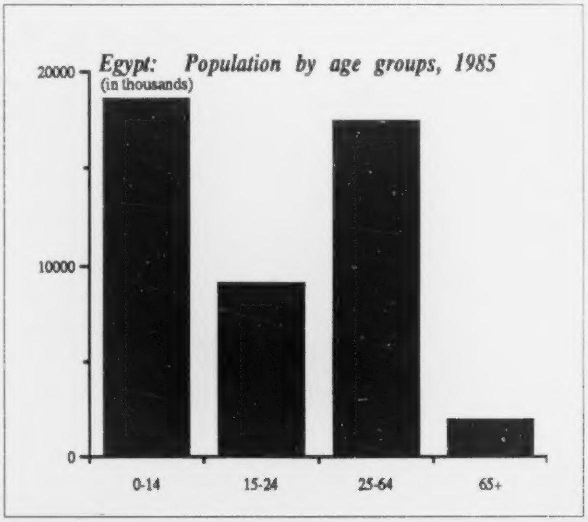
THE STATUS OF WOMEN

Egyptian women lag way behind their counterparts in Europe and the United States in employment, educational attainment, and family planning. Only five percent of Egyptian women were in the labor force in 1981, up from 3.2 percent in 1976, as compared to about 50 percent of women in the U.S. However, although the labor force participation rate for women is very low, those Egyptian women who do work are making some gains in wages. In 1960, women workers in the manufacturing industry made only 51.6 percent of what men made. By 1980, this proportion increased to 63.1 percent.

Educational attainment lags behind that of Egyptian men. Girls made up about 40 percent of primary school students in 1980, but only 37 percent of preparatory students and 36 percent of secondary school students. This proportion drops to 30 percent for students enrolled in higher education.

Women still have large families, averaging 5.5 lifetime births. In 1980, only 25 percent of currently married women aged 15 to 44 were using any method of contraception.





take a quick look at Egypt

POPULATION

Total population (estimated 1986) | **50,524,795**
Rate of population growth (percent) | **2.77**
Lifetime births per woman (total fertility rate) | **5.48**
Birthrate (births per 1,000) | **39.12**
Death rate (deaths per 1,000) | **11.10**
Population under 15 (percent) | **42.3**
Population aged 65 plus (percent) | **3.25**
Median age | **20.2**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **45.9**
Number of persons per square kilometer | **47**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **58/58/59**
Infant mortality rate (number per 1,000 live births) | **102.3**
Population per physician/per nursing person | **800/790**
Daily calorie supply per capita (calories per person per day) | **3,163**

Education

Percent literate (male/female, total percentage) | **54/22, 38**
Number enrolled in secondary education as percentage of age group (male/female) | **64/39**
Number enrolled in higher education as percentage of population aged 20-24 | **16**

Labor force

Percent of labor force in agriculture/industry/services | **46/20/34**
Percentage of population of working age (aged 15-64) | **57**
Age-dependency ratio | **77.9**

STATUS OF WOMEN

Labor force participation rate (percent) | **5.8**
Number enrolled in secondary education as percentage of age group | **39**
Percent of women aged 15-49 using contraceptives | **30**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **46/54**
Population of major metropolitan areas
city name | **Cairo 5,600,000**
city name | **Dakahlia 3,100,000**
Average annual growth in cities of 20,000 or more (percent) | **3.3**
Average annual growth in rural areas (percent) | **1.9**
Rate of total population growth (percent) | **2.7**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$720**

India

THE SEEKERS

Part of India still lives in the age of the bullock cart, but according to many experts India is the development success of the 1970s. What's more, they are enthusiastic about its future. Self-sufficient in grain and 70 percent self-sufficient in oil, India sidesteps many of the problems plaguing other developing countries. Other positive indicators are India's talented business class and solid work force and a growth rate averaging about 5.6 percent a year.

No doubt, however, India is still poor with a per capita GNP of only $ 260 in 1984. But rich poor may be a better way to describe it. With nearly 55 million middle-class consumers, India's potential market rivals that of West Germany and France. On the other end of the economic seesaw are 30 to 50 million people who live in slums without basic facilities.

Whether India will continue on its upward path depends largely on how well it can deal with unrelenting demographic pressures of enormous magnitude. Every year India adds another 16 million persons to its population. In 10 years, it added more people than currently live in Brazil. India is growing at about 2.1 percent a year. At this rate, India's 1986 population of 784 million will grow to 966 million by the year 2000 and 1.2 billion by 2020 when many experts predict that it will leapfrog over China and become the world's most populous nation.

MEGACITIES IN TROUBLE

India is still basically an agrarian country with only 25.5 percent of its 1985 population living in urban areas. Urban areas, however, grew at a much faster rate than rural areas between 1980 and 1985--3.7 percent annually and 1.4 percent annually, respectively. This compares to a 1.9 percent annual growth rate of the population during the same period.

With nearly 55 million middle-class consumers, India's potential market rivals that of West Germany and France.

This trend is expected to continue as people born in India's high fertility period of 1961 to 1981 enter the job market and increasingly migrate to the cities to find work. These large groups of youth will put considerable strain on urban job markets and housing. Experts see India's entry into the 21st century plagued by migration to urban areas, a problem new to India. Previous urban growth has occurred through natural increase of city populations.

By the year 2000, India is expected to have 20 cities of more than 1 million people and 4 megacities exceeding 10 million people. Between 350 and 400 million people will live in urban areas. Experts see cities like Bombay and Calcutta in dire trouble, with projected slum-dweller populations accounting for 75 percent of their total populations.

*See the October 1983 issue of **International Demographics** for in-depth consumer information about India. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

FIVE MILLION INDIANS ENTER THE LABOR FORCE ANNUALLY

Finding jobs for the disproportionately large numbers of youth born before 1981 when India began to reduce its fertility rate will be an ongoing problem. At present, about 5 million people enter the workforce annually. By the year 2000, this figure will escalate to 7.5 million annually. Providing jobs for these would-be workers is an enormous task. Already 23 million Indians are registered as unemployed. Others are underemployed or employed in the informal sector. About 48 percent of India's population lives below poverty level due to poor employment opportunities.

This is a problem that won't go away. India will be a young country well into the 21st century. At present nearly 38 percent of the population is estimated to be under age 15. Although this proportion is projected to drop to 32 percent by 2000, this share of youth is still considerable.

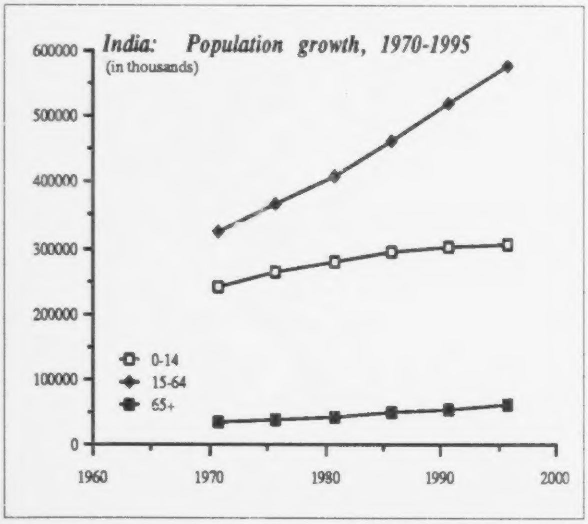
LITERACY AMONG WOMEN HELPS REDUCE THE BIRTHRATE

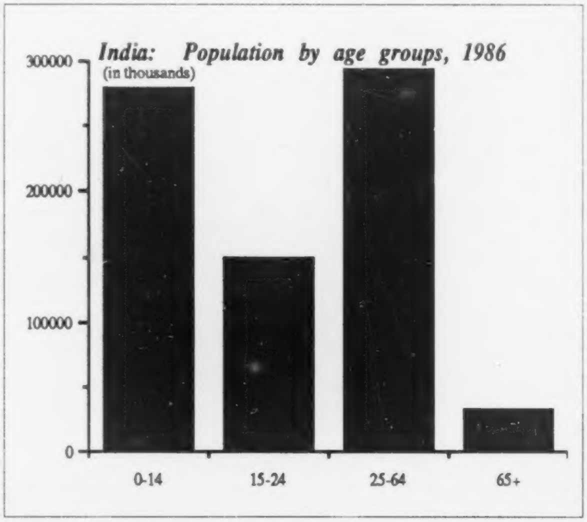
The survival of infants and increased literacy among women help achieve family planning and a decline in India's birthrate. Kerala State had the highest percentage of literate women in 1981--73 percent. It also had the lowest birthrate--25 per 1,000 as compared to India's overall 33.6 per 1,000. Infant mortality was 37 per 1,000 compared to India's average of 100 per 1,000.

TAXES AND RELIGION INFLUENCE BUYING HABITS

For those with disposable income, popular consumer items include footwear, pharmaceuticals, books, and food. The demand for such luxury items as cars, cameras, air conditioners, and refrigerators has increased.

Taxes, however, strongly influence buying patterns. Consumer items are heavily taxed. Religion also plays an important part in consumer behavior, influencing all parts of Indian life from the choice of food and dress to business and recreational activities.





take a quick look at India

POPULATION

Total population (estimated 1986) | **783,939,780**
Rate of population growth (percent) | **2.08**
Lifetime births per woman (total fertility rate) | **4.16**
Birthrate (births per 1,000) | **32.28**
Death rate (deaths per 1,000) | **11.46**
Population under 15 (percent) | **37.6**
Population aged 65 plus (percent) | **3.3**
Median age | **21**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **50.0**
Number of persons per square kilometer | **232**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **55/57**
Infant mortality rate (number per 1,000 live births) | **98.6**
Population per physician/per nursing person | **2,610/4,670**
Daily calorie supply per capita (calories per person per day) | **2,115**

Education

Percent literate (male/female, total percentage) | **47/25**
Number enrolled in secondary education as percentage of age group (male/female) | **39/20**
Number enrolled in higher education as percentage of population aged 20-24 | **9**

Labor force

Percent of labor force in agriculture/industry/services | **70/13/17**
Percentage of population of working age (aged 15-64) | **56**
Age-dependency ratio | **69**

STATUS OF WOMEN

Labor force participation rate (percent) | **33**
Number enrolled in secondary education as percentage of age group | **20**
Percent of women aged 15-49 using contraceptives | **35**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **26/74**

Population of major metropolitan areas

city name | **Calcutta 9,166,000**

city name | **Bombay 8,227,000**

Average annual growth in cities of 20,000 or more (percent) | **3.7**

Average annual growth in rural areas (percent) | **1.4**

Rate of total population growth (percent) | **2.0**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$260**

Indonesia

THE SEEKERS

Plunging oil prices in 1986 for oil-dependent Indonesia mean a shrinking GDP is likely in 1987--the first contraction of GDP in 20 years. Experts anticipate as much as a 3 percent fall in GDP and as little as no change at all. Real GDP grew at 1.9 percent in 1985. If predictions are accurate, Indonesia's GDP will not keep up with its 1986 population growth rate of 2.07 percent, but register a -1.1 growth rate in 1986. And, unless oil prices bounce back, 1987 doesn't look any better.

Urban and industrial areas were the first to suffer from the oil-price fall, with factory layoff increases. The countryside fared much better, with farmers richer for the big rice crops of recent years. Buying power is still strong in the countryside with companies maintaining current prices to keep demand high. Many companies swallowed the 1985 10 percent value-added sales tax rather than pass costs on to consumers. However, the September 1986 rupiah devaluation against the dollar of about 30 percent is soon to drive up the cost of imports. Indonesian manufacturers dependent on imported materials will most likely have to pass their costs on to the consumer.

RAPID URBANIZATION IN A MAINLY AGRARIAN COUNTRY

As in many Seeker countries, Indonesia's population growth rate increased over the last 20 years, due to reductions in mortality outpacing fertility declines during the 1950s and 1960s. During the 1970s, Indonesia's population grew at an average annual rate of 2.3 percent, up from 1.5 percent annually during 1930s through the 1960s. Indonesia's population increased from 120 million in 1970 to its current estimated population of 176.7 million in 1986. Indonesia is now the world's fifth most populous country.

This growth, coupled with economic recovery that began in the late 1960s, led to rapid urban growth. During the 1970s, Indonesia's urban population grew at nearly 5 percent a year. Indonesia's urban growth rate exceeds that of such other Seeker countries as India, Malaysia, and Egypt.

> ***Indonesia now has 5 cities of more than 1 million inhabitants and has avoided the hyper-urbanization trap of such Climber countries as Mexico and Thailand in which one city is home to a quarter or a third of a country's population.***

The urban share of Indonesia's population, however, is still relatively low. Indonesia's 1950 urban population only accounted for 12.4 per cent of the total population. It now accounts for about 25 percent of the total population.

This trend continues today with urban areas growing by 4.4 percent annually between 1980 and 1985 and rural areas increasing by only 0.9 percent annually over the same period. This compares to a population growth rate of 2.07 for the entire country. By the year 2000, Indonesia's cities are projected to grow by almost 40 million people.

See the January 1983 issue of ***International Demographics*** *for in-depth consumer information about Indonesia. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

Indonesia now has 5 cities of more than 1 million inhabitants and has avoided the hyper-urbanization trap of such Climber countries as Mexico and Thailand in which one city is home to a quarter or a third of a country's population. Jakarta accounts for 19 percent of Indonesia's population.

Urban dwellers generally fare better than those in the country. In 1980, only 19 percent of urban residents were considered living in poverty, as compared to about 44 percent of rural residents. Of those 15 to 19 years old in 1980, 53 percent were enrolled in secondary education, while only 25 percent of those of the same age living in rural areas were enrolled.

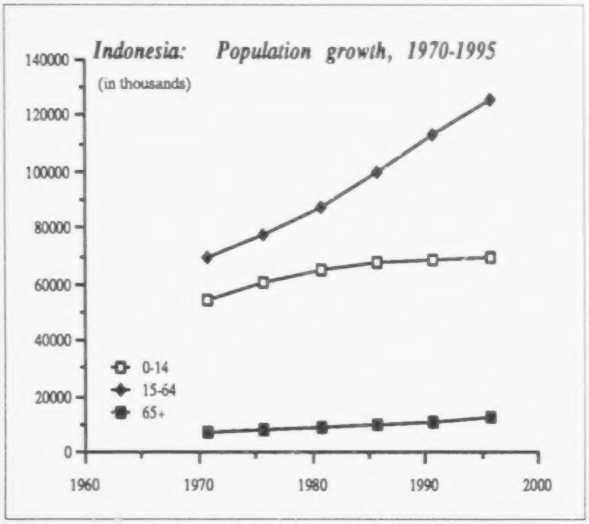
THREE OUT OF FOUR INDONESIANS UNDER AGE 34

With life expectancy at only 56 years for men and 59 years for women, it comes as no surprise that the Indonesian population is young. About 40 percent of the population is under age 15. Another 34 percent are aged 15 to 34. Only 2.6 percent of the population is aged 65 or over.

LOW PER CAPITA GNP, LOW OWNERSHIP OF CONSUMER DURABLES

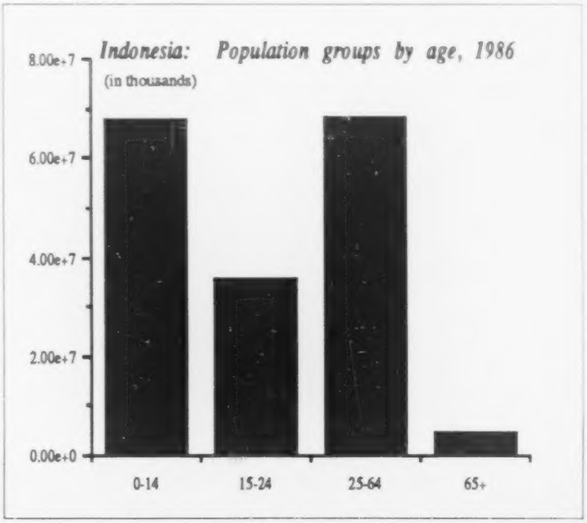
Indonesia's per capita GNP in 1986 only amounted to $540. Great disparities exist between the the poor and the rich, with the lowest 20 percent of households in 1976 only accounting for 6.6 percent of total household income and the highest 20 percent accounting for 49 percent of household income.

Only 10 percent of all households owned a TV in 1980, but 32 percent of urban households owned sets. One-half of all TVs were found in urban areas. Ownership of radios and cassette recorders was more widespread--forty percent of all households owned them. Over 10 million bicycles were in use in 1980, owned about equally by 30 percent of all urban and rural households. There were 2.3 million motorcyles in 1980, but only 577,000 registered passenger cars.



Indonesia: Population growth, 1970-1995

(in thousands)



Indonesia: Population groups by age, 1986

(in thousands)

take a quick look at Indonesia

POPULATION

Total population (estimated 1986) | **176,764,263**
Rate of population growth (percent) | **02.07**
Lifetime births per woman (total fertility rate) | **3.70**
Birthrate (births per 1,000) | **30.58**
Death rate (deaths per 1,000) | **9.87**
Population under 15 (percent) | **38.5**
Population aged 65 plus (percent) | **2.6**
Median age | **20.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **50.2**
Number of persons per square kilometer | **87**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **56/59**
Infant mortality rate (number per 1,000 live births) | **86.4**
Population per physician/per nursing person | **11,320/NA**
Daily calorie supply per capita (calories per person per day) | **2,380**

Education

Percent literate (male/female, total percentage) | **70/45, 57**
Number enrolled in secondary education as percentage of age group (male/female) | **36/24**
Number enrolled in higher education as percentage of population aged 20-24 | **4**

Labor force

Percent of labor force in agriculture/industry/services | **57/13/30**
Percentage of population of working age (aged 15-64) | **56**
Age-dependency ratio | **72.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **30**
Number enrolled in secondary education as percentage of age group | **24**
Percent of women aged 15-49 using contraceptives | **50**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **25/75**
Population of major metropolitan areas
    city name | **Jakarta 6,500,000**
    city name | **Surabaya 2,000,000**
Average annual growth in cities of 20,000 or more (percent) | **4.4**
Average annual growth in rural areas (percent) | **0.9**
Rate of total population growth (percent) | **2.07**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$540**

Malaysia

THE SEEKERS

Demographically speaking, Malaysian markets offer great potential. The population grew at 2.4 percent annually between 1973 and 1984, indicating an expanding market of potential consumers. Malaysia's urban population grew during the same period at 3.6 percent a year. As a result, the percentage of the population living in urban areas increased from 26 percent in 1965 to 31 percent in 1984. Per capita GNP was $2,037 in 1984. In Southeast Asia, only Singapore and oil-rich Brunei had higher GNP per capita levels. Such indicators of a rising status of women as increased educational attainment and labor force participation are positive. Forty-three percent of Malaysian women of the appropriate age were enrolled in higher education in 1981. In 1985, 44.7 percent of women over 15 were working or looking for work.

And its economic performance between 1976 and 1986 was nothing short of phenomenal, driven by its concerted effort to diversify and strengthen its private sector economy. Average annual growth of GDP was 6.2 percent during this period. Private consumption increased by 6.9 percent annually between 1973 and 1984. Exports were up by 7.5 percent over the same period and imports rose 8.9 percent annually. (The U.S. supplies about 15 percent of Malaysian imports and buys about 14 percent of Malaysian exports.) Analysts see Malaysia as a prime area for investment.

ECONOMIC SUCCESS KEEPS UP WITH SUSTAINED RAPID GROWTH

Rapidly falling death rates after World War II combined with the high fertility rates of the 1950s and 1960s led to rapid population increase. The 1950 population of about 6.3 million more than doubled to its current level of 15.5 million in only 35 years. Fertility fell steadily from a high of 6 or 7 lifetime births per woman in the 1950s and 1960s to 3.2 lifetime births per woman in 1986. Declining fertility rates of the 1970s and 1980s have slowed population growth from a high of 3 percent annually between 1960 and 1965 to 2.3 percent annually between 1980 and 1985.

> ***Malaysia's population is young and will remain so well into the 21st century due to the disproportionately large numbers of youth (born during the high-fertility 1950s and 1960s) entering their child-bearing ages.***

This trend is expected to continue with the growth rate down to about 1.5 percent by the year 2000. Lifetime births per woman are also expected to fall from its current 3.2 children per woman to the just-above-replacement-level figure of 2.4 lifetime births.

The Malaysian population, however, will continue to experience rapid growth due to above-replacement-level fertility rates and the large number of women born during the

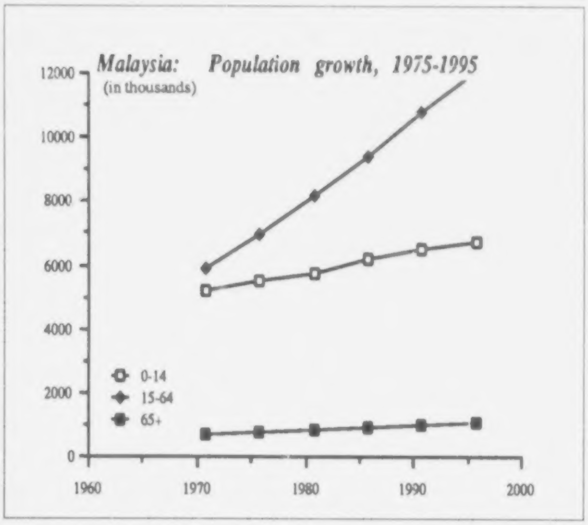
*See the Jauary 1985 issue of **International Demographics** for in-depth consumer information about Malaysia. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

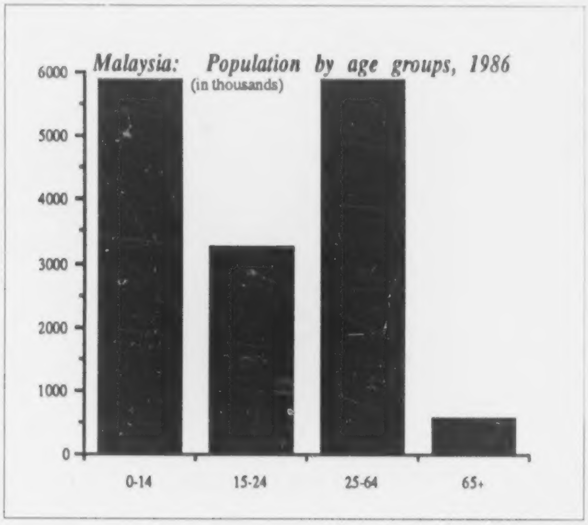
high-fertility 1950s and 1960s entering their childbearing ages. The proportion of women aged 15 to 29 grew from 26 percent of all women in 1970 to 30 percent in 1980. This trend in increased proportions of women entering childbearing ages will continue for at least the next 15 years. Malaysia's 1985 population of 15.5 million is projected to grow to 20.6 million by the year 2000 and 26 million by the year 2020.

ONE OUT OF EVERY TWO MALAYSIANS ARE UNDER 21

Malaysia's population is young and will remain so well into the 21st century due to the disproportionately large numbers of youth (born during the high-fertility 1950s and 1960s) entering their childbearing ages. Those aged 15 to 24 now account for about 22 percent of the population--3.3 million people. This group will grow to 3.9 million by the year 2000 and 4.3 million by 2010.

The proportion of the population in their prime spending years (aged 15 to 64)-- now 59.5 percent of the total population--is expected to increase dramatically, accounting for 65 percent of the total population in the year 2000 and almost 70 percent by 2020. At present, more than half of all Malaysians are under age 21. About 37 percent are under age 15.





take a quick look at Malaysia

POPULATION

Total population (estimated 1986) | **15,738,388**
Rate of population growth (percent) | **2.09**
Lifetime births per woman (total fertility rate) | **3.18**
Birthrate (births per 1,000) | **27.66**
Death rate (deaths per 1,000) | **6.69**
Population under 15 (percent) | **36.5**
Population aged 65 plus (percent) | **3.8**
Median age | **20.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **52.1**
Number of persons per square kilometer | **47**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **66/64/69**
Infant mortality rate (number per 1,000 live births) | **34.8**
Population per physician/per nursing person | **3,920/1,390**
Daily calorie supply per capita (calories per person per day) | **2,477**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **56/53**
Number enrolled in higher education as percentage of population aged 20-24 | **4**

Labor force

Percent of labor force in agriculture/industry/services | **42/19/39**
Percentage of population of working age (aged 15-64) | **60**
Age-dependency ratio | **71.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **44.7**
Number enrolled in secondary education as percentage of age group | **53**
Percent of women aged 15-49 using contraceptives | **42**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **65/35**

Population of major metropolitan areas

city name | **Kuala Lumpur 937,875**

city name | **George Town 269,247**

Average annual growth in cities of 20,000 or more (percent) | **4.6**

Average annual growth in rural areas (percent) | **1.2**

Rate of total population growth (percent) | **2.1**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,037**

South Africa

THE SEEKERS

Under normal circumstances, South Africa would look like a potential market for many goods and services required by a growing middle class. Yet, regardless of how you feel about South Africa's social and political policies, 1987 is not a good year to consider it as a potential market or place of investment. White South Africans who control the majority of the country's personal wealth are in a difficult position. Some portion of their assets are usually tied up in real estate. Given the situation in South Africa, those assets are not liquid nor can they be made liquid. Residents of other countries with stable middle classes have taken care of their basic needs and they seek experiences that will fulfill their lives. South Africans have all the "experiences" they can handle at the moment.

REDISTRIBUTING THE INCOME

Reports are that since 1980 there has been substantial redistribution of disposable income in South Africa. The black, colored, and Asian share of total disposable income rose by 12. 2 percent to 44.5 percent between 1972 and 1985, according to a Bureau of Market Research survey reported in African Business. Even if this shift in disposable income is true, non-whites make up 85 percent of the population in South Africa. The report says that between 1981 and 1985, white incomes fell by 0.3 percent a year while the incomes of blacks and coloreds rose by 1.8 percent and those of Asians by 3.1 percent.

WHAT COULD CHANGE

South Africa's annual population growth rate is now high because of the high birthrates of blacks and coloreds. The average white South African woman has two children; an Indian or colored woman has three; an urban black woman has four; and a black woman in the traditional states has between five and seven--a similar total fertility rate to the large African nations such as Kenya or Nigeria.

> ***If reforms allow blacks to become equal participants in the economic life of the nation, South Africawould probably move for a time into the Climber ranks as the needs for housing and increased infrastructure are filled.***

Demographers at the Institute for Sociological and Demographic Research say that the low level of urbanization among blacks--in other words, the South African policy of separatism that relegates blacks to the "homelands" rather than allowing them to find opportunities in the cities, contributes to the continued high level of population growth. They believe that if blacks were allowed to freely move to the cities, they would have access to the "technological revolution that has changed the lives of millions of people across the world."

The researchers indicate, "With regard to Blacks, their relatively youthful population

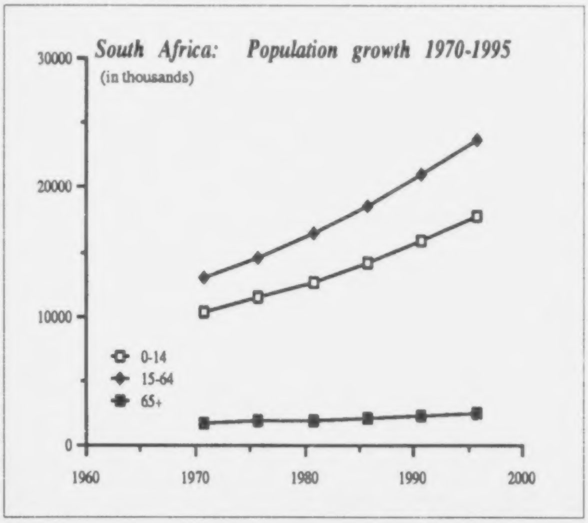
*See the June 1984 issue of **International Demographics** for in-depth consumer information about South Africa. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

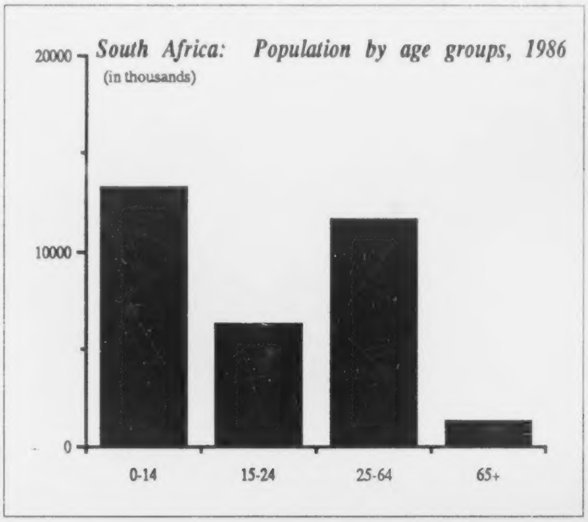
structure and present high fertility indicate a capacity for continued very fast population growth. A sharp decline in the population growth rate could, however, be brought about by rapidly replacing the large traditional way of life of Blacks in the national states with a more modern industry-oriented urban lifestyle."

Not surprisingly, the conclusion drawn from an analysis of the demographic trends in South Africa is that unless non-whites are fully integrated into society, there will be no way to begin to eliminate the current socioeconomic discrepancies that are responsible for much of the turmoil in which the country finds itself.

If reforms allow blacks to become equal participants in the economic life of the nation, it would probably move for a time into the Climber ranks as the needs for housing and increased infrastructure are filled. However, there are educated blacks in South Africa who have the capability of building the country in such a way that its mineral wealth and prime agricultural land benefit all people, rather than the white minority. In that case, the country could make gigantic strides in ways that some other African countries have found difficult. The demographers indicate that if blacks are integrated into the economic mainstream, by the turn of the century, population growth among blacks would begin to slow.

South Africa does not appear to be a good potential market for most consumer goods until blacks and other non-whites have access to economic opportunity in the country.





take a quick look at South Africa

POPULATION

Total population (estimated 1986) | **33,544,450**
Rate of population growth (percent) | **2.27**
Lifetime births per woman (total fertility rate) | **4.24**
Birthrate (births per 1,000) | **32.46**
Death rate (deaths per 1,000) | **9.73**
Population under 15 (percent) | **38.5**
Population aged 65 plus (percent) | **4.2**
Median age | **19.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.8**
Number of persons per square kilometer | **27**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **57/64**
Infant mortality rate (number per 1,000 live births) | **68.1**
Population per physician/per nursing person | **2,050/500**
Daily calorie supply per capita (calories per person per day) | **2,897**

Education

Percent literate (male/female, total percentage) | **57/57, 57**
Number enrolled in secondary education as percentage of age group (male/female) | **NA**
Number enrolled in higher education as percentage of population aged 20-24 | **4**

Labor force

Percent of labor force in agriculture/industry/services | **17/35/49**
Percentage of population of working age (aged 15-64) | **56**
Age-dependency ratio | **82.0**

STATUS OF WOMEN

Labor force participation rate (percent) | **30**
Number enrolled in secondary education as percentage of age group | **NA**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **56/44**
Population of major metropolitan areas
city name | **Pretoria 561,000**
Average annual growth in cities of 20,000 or more (percent) | **3.5**
Average annual growth in rural areas (percent) | **1.3**
Rate of total population growth (percent) | **2.48**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,340**

Sri Lanka

THE SEEKERS

Sri Lanka's new open economy has raised hopes for future prosperity. After the United National Party elected in 1977 began shifting the economy to a free-market system, real GNP growth rose an average of 6 percent a year during the period 1978 to 1982, in contrast to 3 percent annual growth recorded during the period 1970 to 1977. Sri Lanka is still poor, however. In 1984, The World Bank estimated Sri Lankan per capita GNP at $360.

Notwithstanding the disruption caused by the Tamil guerrillas' demand for a homeland embracing Sri Lanka's Northern and Eastern Provinces, experts see Sri Lanka as a good bet for foreign investment. Sri Lanka's commitment to economic development is clear. Foreign investment is encouraged through a free-trade zone and tax holidays modeled after Singapore's trade policies. Price controls and import barriers have been lifted and greater incentives have been offered to private entrepreneurs.

A YOUNG, FAST-GROWING POPULATION

Sri Lanka's population is growing fast, despite continued falling birthrates. In 1986, Sri Lanka's rate of population growth was 3.41 percent, a quick pace well above the 1.5 to 2.5 percent growth rate considered necessary to be a good shot as a potential market in 1987.

The 1981 census recorded 14.8 million persons, up from 12.7 million in 1971. The population grew by 17 percent during the decade between censuses. The Census Bureau's Center for International Research now estimates a population of 18.3 million. By the year 2000, the Sri Lankan population is projected to reach 27.8 million; by 2025, 46 million--over double its current population.

The number of children women commonly bear in their lifetimes, however, is dropping and is expected to continue doing so. In 1981, Sri Lankan women commonly bore 6.5 children in their lifetimes. By 1986, this figure had dropped to 5.8 children; by 2005, it is expected to drop further to 3.4 children per woman. However, although decreasing, these fertility rates remain high. It will take years for declining fertility rates to have a significant effect on population growth rates.

In 1986, Sri Lanka's rate of population growth was 3.41 percent, a quick pace well above the 1.5 to 2.5 percent growth rate considered necessary to be a good shot as a potential market in 1987.

Sri Lanka's population is young and will stay so well into the 21st century. At present, 41 percent of the population is under age 15. Median age is a young 22 years.

LARGELY RURAL WITH HIGH POPULATION DENSITY

About 79 percent of Sri Lanka's population lived in rural areas in 1986. Although urban growth outpaces rural growth, Sri Lanka will remain largely rural throughout this century.

See the February 1984 issue of ***International Demographics*** *for in-depth consumer information about Sri Lanka. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

By the year 2000, about 75 percent of the population will reside in the countryside. This should drop, however, to 61 percent by the year 2020.

Sri Lanka is divided into 24 administrative districts. They range in size from 77,500 persons in the northeastern district of Mullaitivu to almost 1.7 million in the southwestern district of Colombo, location of the capital city of Colombo. In fact, with a population of 1.3 million in 1981, the capital city accounted for three-quarters of the population of the district. Other major cities are Jaffna (271,000), Kandy (147,000), and Galle (168,000).

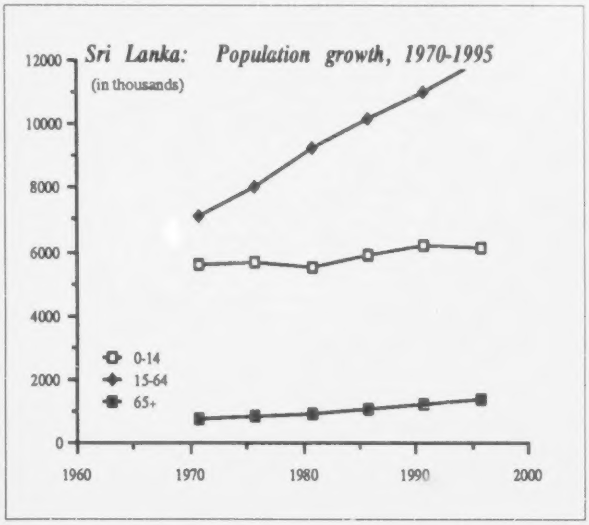
In a country the size of West Virginia (66,000 square kilometers), population density is about 250 persons per square kilometer. Density is highest in the district of Colombo (1,000 to 3,000 persons per square kilometer) and the neighboring coastal districts of Gampaha and Kalutara (500 to 1,000 persons per square kilometer). The central district of Kandy and the southern coastal district of Matara are in this density range as well, while all other districts average fewer than 500 persons per square kilometer.

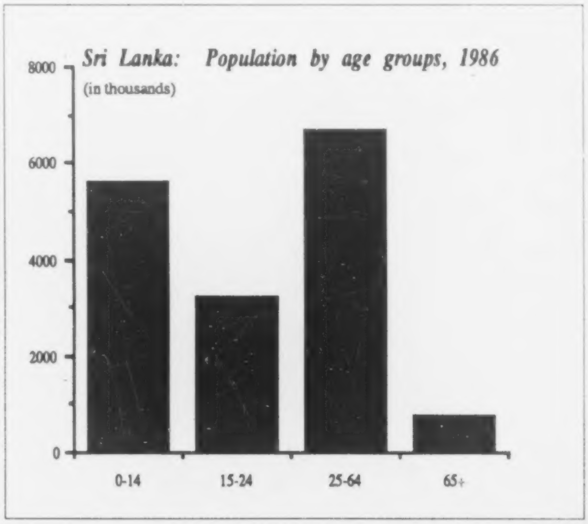
EXTENDED FAMILIES ARE THE NORM

Seventy percent of all households in 1981 were extended beyond the nuclear family with a relative other than spouse or children. Fourteen percent of all households had a nonrelative. Urban households were more likely to contain another relative than rural households. For example, among the 504,000 household heads recorded for urban areas, there were 538,000 relatives of heads living in households. In rural areas, only 64 percent of households contained relatives other than spouse or children.

Of Sri Lanka's 2.7 million households in 1981, about 2.2 million households were classified as rural, or 82 percent of the total.

Sri Lankan households are large compared to those of Climber or Ultimate Consumer countries. There were 2.7 million households in Sri Lanka in 1981, with an average size of 5.4 persons per household. About 17 percent of all households were headed by women in 1981, half of whom were widowed.





take a quick look at Sri Lanka

POPULATION

Total population (estimated 1986) | **18,341,494**
Rate of population growth (percent) | **3.41**
Lifetime births per woman (total fertility rate) | **5.87**
Birthrate (births per 1,000) | **44.09**
Death rate (deaths per 1,000) | **6.16**
Population under 15 (percent) | **41.1**
Population aged 65 plus (percent) | **4.2**
Median age | **22.2**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.2**
Number of persons per square kilometer | **250**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **68/72**
Infant mortality rate (number per 1,000 live births) | **29.9**
Population per physician/per nursing person | **7,620/1,260**
Daily calorie supply per capita (calories per person per day) | **2,348**

Education

Percent literate (male/female, total percentage) | **91/81**
Number enrolled in secondary education as percentage of age group (male/female) | **49/54**
Number enrolled in higher education as percentage of population aged 20-24 | **4**

Labor force

Percent of labor force in agriculture/industry/services | **53/14/33**
Percentage of population of working age (aged 15-64) | **60**
Age-dependency ratio | **62.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **35**
Number enrolled in secondary education as percentage of age group | **54**
Percent of women aged 15-49 using contraceptives | **55**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **21/79**

Population of major metropolitan areas

city name | **Colombo 1,300,000**

city name | **Jaffna 271,000**

Average annual growth in cities of 20,000 or more (percent) | **1.6**

Average annual growth in rural areas (percent) | **2.2**

Rate of total population growth (percent) | **3.4**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$360**

Tunisia

THE SEEKERS

Looking at a map, north and south of the Mediterranean isn't all that far apart. Demographically, it's more like worlds apart. Whereas most of the populations of Ultimate Consumer countries of Europe are either not growing or even declining, the populations of Northern African countries are exploding. Tunisia's population is growing so rapidly that in the last 15 years, it has increased by 45 percent. And with the number of births per woman projected to remain fairly high until the year 2000, and disproportionately large groups of youth born during periods of high fertility entering their childbearing years, Tunisia's population will continue to grow rapidly.

Tunisia's 1986 population of 7.4 million people is projected to increase to 8.1 million in 1990 and to 9.9 million in the year 2000. Women commonly bear 4 or 5 children. Due to the government's family planning program, however, the number of births per woman is expected to decline to about 3.8 births per woman in 1990 and to about 3 births per woman in the year 2000. At these rates, the population will continue to grow although growth will slow after the large population bases built up by periods of past high fertility pass through their reproductive years.

YOUTH ADD TO UNEMPLOYMENT PROBLEM

Unemployment is a problem in Tunisia, partly because of its extremely youthful age structure, in which about 40 percent of the population is under age 15. Those aged 15 to 24 make up an additional 20 percent of the total population. Because of the growing numbers of youth who are of employable age, more than 60,000 new workers enter the labor force each year while only 40,000 new jobs are created annually.

The government officially recorded the growing unemployment rate at about 13 percent in 1983. A more realistic figure for men aged 15 to 59 during this same year was closer to 18 percent. When women and the underemployed are included, one out of four workers is unemployed. To help alleviate this problem, Tunisians are encouraged to go abroad for employment. An estimated 70,000 laborers found work in Europe in 1984.

> ***Unemployment is a problem in Tunisia, partly because of its extremely youthful age structure, in which about 40 percent of the population is under age 15.***

Women are entering the labor force in increasing numbers. Women made up only 11 percent of the workforce in 1975. In 1984, they held 20 percent of the available jobs. However, over 80 percent of employed women are in the lower third wage-earning bracket.

Most Tunisians work in agriculture, although an increasingly smaller proportion of the workforce is required to farm the arable land. In 1960, agricultural production required the labors of over 50 percent of the

*See the January 1986 issue of **International Demographics** for in-depth consumer information about Tunisia. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

workforce, compared with 35 percent in 1980. Industry consumed 19 percent of the workforce; service industries, 17 percent; and construction, 10 percent.

WOMEN HAMPERED BY TRADITION, NOT LAW

Things have changed for Tunisian women. They now are full citizens with the same legal rights and responsibilities as men. They are encouraged to attend school, hold jobs outside the home, and control their own financial affairs.

But old traditions die hard. Some movement has been made in employment, with fully 20 percent of the Tunisian labor force made up of women. However, women hold primarily low-wage positions. Educational attainment too is up, with girls making up 40 percent of primary school students and 40 percent of secondary school students as well.

RURAL-TO-URBAN SHIFT

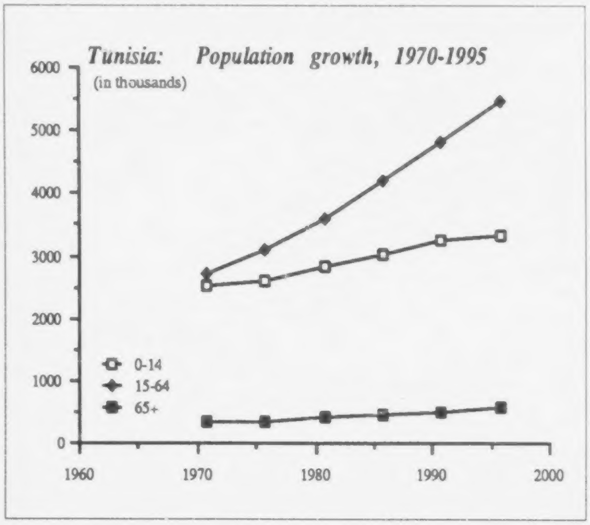
In 1950, 31 percent of Tunisia's population lived in cities, with 69 percent living in rural areas. By the year 2000, exactly the opposite will be true. Urban areas have been growing rapidly, spurred by the increasing numbers of job seekers moving to the densely populated cities.

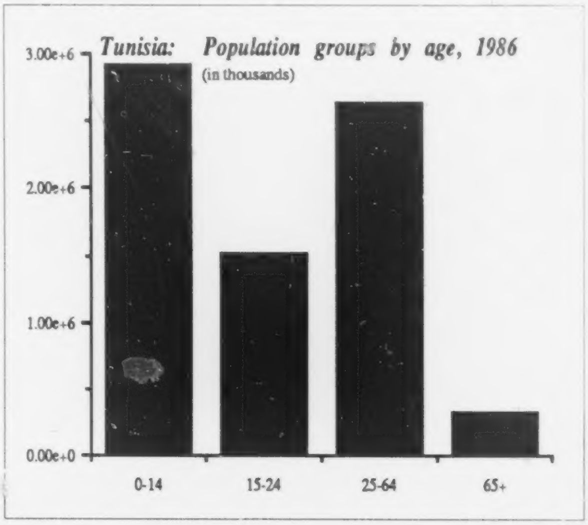
Growth in rural areas has been negligible since the early 1960s, while urban growth has averaged about 4 percent annually. Tunis, the capital city, went from about 685,000 residents in 1966 to almost 874,000 in 1985.

AN ECONOMY IN TROUBLE

One of Tunisia's greatest economic problems is its failing agricultural sector. Much of the food consumed by Tunisians is imported, contributing to a growing negative trade balance. Agricultural problems stem from adverse weather conditions and the small size of farms which lessens the applicability of modern farming methods.

In 1983, olive oil production fell by 31 percent, grain by 28 percent, and citrus fruit by nearly 17 percent. Increased production of fruit, vegetables, and livestock offset other crop failures to produce growth of only 0.2 percent. The tourist industry, too, is in trouble. Terrorism and the 1984 bread riots led to an 8 percent decline in industry revenues. Although the government is forecasting a turnaround, outside observers see further decline or no growth in the near future.





take a quick look at Tunisia

POPULATION

Total population (estimated 1986) | **7,387,306**
Rate of population growth (percent) | **2.35**
Lifetime births per woman (total fertility rate) | **4.31**
Birthrate (births per 1,000) | **30.13**
Death rate (deaths per 1,000) | **6.68**
Population under 15 (percent) | **39.6**
Population aged 65 plus (percent) | **4.4**
Median age | **19.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.9**
Number of persons per square kilometer | **44**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **67/70**
Infant mortality rate (number per 1,000 live births) | **49.2**
Population per physician/per nursing person | **3,620/950**
Daily calorie supply per capita (calories per person per day) | **2,889**

Education

Percent literate (male/female, total percentage) | **51/25, 62**
Number enrolled in secondary education as percentage of age group (male/female) | **37/23**
Number enrolled in higher education as percentage of population aged 20-24 | **5**

Labor force

Percent of labor force in agriculture/industry/services | **35/36/29**
Percentage of population of working age (aged 15-64) | **56**
Age-dependency ratio | **78.3**

STATUS OF WOMEN

Labor force participation rate (percent) | **19**
Number enrolled in secondary education as percentage of age group | **23**
Percent of women aged 15-49 using contraceptives | **41**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **57/43**

Population of major metropolitan areas

city name | **Tunis 873,515**

city name | **Sfax 256,739**

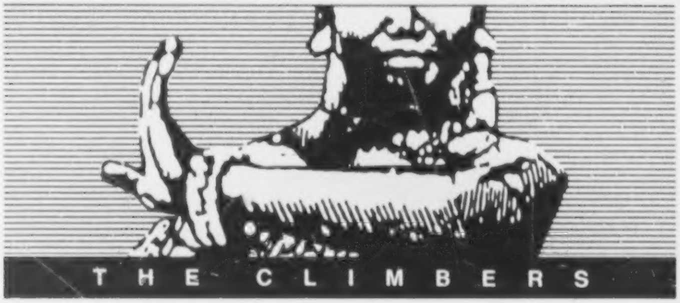
Average annual growth in cities of 20,000 or more (percent) | **4.0**

Average annual growth in rural areas (percent) | **0.4**

Rate of total population growth (percent) | **2.41**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$1,270**



THE CLIMBERS

Here they come. The Climbers are making everyone nervous. For Asia watchers, Climbers Taiwan and South Korea are on the move. Their mentor, Japan--no longer a Climber but a full-fledged Ultimate Consumer--showed the way and is now on top, with average income surpassing that in the U.S. What Japan did, these Climbers hope to do. For those looking at Latin America, Brazil is moving full force ahead. Some say the 21st century will belong to big and booming Brazil.

But all the Climbers are not climbing at the same rate, especially when it comes to overall standard of living and consumer purchasing power. Although GDP growth rates for most Asian Climber countries surpass those of the U.S. and other industrialized nations, debt-saddled Latin American Climbers are having a hard go of it. GDP in China grew at 5.6 percent annually between 1970 and 1982, and registered a surging 9 percent growth in 1983 and an amazing 12 percent in 1984. In South Korea GDP grew at an annual rate of 8.6 percent between 1970 and 1982, in the Philippines by 6 percent, in Taiwan by 8 percent, and in Thailand 7.1 percent during the same period.

THE RIGHT DEMOGRAPHIC MAKE-UP

But economics aside, the Climbers have the right demographic makeup for expanding potential markets. The status of women is improving through increased participation in the labor force and rising levels of education. Youth predominate, creating a lively labor pool and ready consumer group, despite declining population growth rates and declining average number of lifetime births per woman. These young adult populations now growing rapidly due to past high fertility will continue to do so well into the next century. Several cities are active and growing, as opposed to just one enormous mega-city, so that the pressures of urban growth--especially that caused by rural-to-urban migration--can be shared. Many Latin American Climbers, however, such as Peru, Mexico, and Venezuela, face increasingly persistent population pressures on their primate cities.

These four positive demographic indicators point to a potential increase in consumer demand. Rapid population growth in Climber countries has the potential of creating a new more affluent market and a huge labor force. Purchasing power in these countries is on the rise. Markets will expand as growth in incomes and populations continues.

The predominance of youth in Climber countries creates a growing demand for goods and services, education, and employment, while the rural-urban shift offers tremendous opportunities for business in the areas of construction, sanitation, power, telecommunications, and transport, according to UNFPA Executive Director Rafael M. Salas.

As low-demand, scattered rural markets concentrate into centralized urban markets, new consumer markets emerge. Such Asian Climber countries as the Philippines, which was 37.4 percent urban in 1980, will be about 66 percent urban by 2025. Such Latin American Climbers as Brazil will see urban population climb from 67.5 percent in 1980 to nearly 90 percent by 2025. Because Latin America has been traditionally more urban than other developing regions of the world, however, this trend will not be as strong in Latin American Climber countries.

Women in Climber countries are on the way up. Labor force participation rates in 1982 in such Asian Climbers as South Korea (42 percent), Taiwan (40 percent), China (74 percent) and Thailand (65 percent) compare with Ultimate Consumer West Germany's 39 percent and the U.S.'s 53 percent. Fewer children per woman goes hand in hand with increased opportunities for personal determination of the course of women's lives, for personal development and achievement, and ultimately for leisure and consumption.

LOWERED FERTILITY MEANS AN EVENTUAL END TO POPULATION GROWTH

Population growth rates have begun to decline in the Climber countries. The average number of lifetime births per woman have fallen by a quarter or more over the past decade in such populous Latin American and Asian Climber countries as Brazil, Mexico, and Thailand. These countries, however, have a long way to go before births and deaths are in balance and population stabilizes, but they are moving in the right direction.

Some, like China, South Korea, and Taiwan, have reached or are close to reaching replacement level of 2.1 lifetime births per woman, which means that their populations will eventually stop growing and stabilize. (Allowing for some childhood deaths, 2.1 children per couple allows a population to just reproduce itself.) Take China, for example. Although fertility rates are down to replacement level, the large number of women of childbearing age born in past high-fertility years (270 million) will keep adding more children to the population. Only after the numbers of women of childbearing age decline will the population stop growing.

ECONOMIC GROWTH MUST KEEP PACE WITH POPULATION GROWTH

Continued economic growth is all important to still-growing populations of most Climber countries. The falling population growth rates of the Climber countries will not take the pressure off most of these countries until the beginning of the next century at the earliest. Large numbers will be added before their populations stabilize even after they attain replacement-level fertility because of the population momentum of their large and youthful population bases.

This is especially true for the economically troubled Climber countries in Latin America such as Mexico and Peru. And even such economic movers as Climbers Brazil and Venezuela will have to grow at a rapid pace to just tread water. Rapid population growth, however, has its detractors and backers. Some argue that rapid population growth is a stimulant for economic growth; others see it as a deterrent. No matter which side of the debate, however, no one doubts that rapidly expanding populations do add time constraints to the big task of providing jobs and housing.

CLIMBERS HAVE SIZEABLE AND RELATIVELY AFFLUENT MIDDLE CLASSES

Many Climber countries already have a relatively affluent and sizeable class of consumers. In many Climber countries such as Korea and Taiwan (where population rates have slowed but the population is still growing), economic growth is keeping pace or exceeding the rate of population growth, resulting in rising purchasing power.

Then too, whether the rising wealth of Climber countries is distributed evenly or unevenly throughout the population tells a lot about the structure of the potential market. Currently, the markets in these countries are typically not homogeneous. Latin American Climber countries in particular have not created jobs as fast as job-seekers have arrived in cities, leading to large differentials in the income of those who work in the formal sector and the informal sector. These income disparities are less acute in most of the Asian Climber countries.

Brazil

THE CLIMBERS

Brazil is back. After the oil price shock of 1979 and the foreign debt crunch of 1982, growth is strong with real GDP levels on the rise, inflation down, and exports surging. Brazil's 1985 growth rate of 8.3 percent topped all others worldwide. And only Japan and West Germany beat Brazil's 1985 $12 billion trade surplus--a surplus sufficient to cover interest on Brazil's foreign debt. Retail sales have jumped 30 to 40 percent, with industries going to full production to meet demand. Unemployment, in response, is down. Manufactured goods now account for 55 percent of total exports, up from 30 percent only 10 years ago. And the future looks bright. Brazilian officials predict that by the year 2000, Brazil will be the fifth-largest free-market economy, trailing only the U.S., Japan, West Germany, and Britain.

All this good news goes hand in hand with Brazils' demographic picture. Demographically, Brazil's got what it takes to assure expanding markets in the future. Predominately young and still growing, Brazil's population offers marketers an expanding class of consumers with rising purchasing power. Brazil's women figure prominently, having benefited from increased educational attainment and labor force participation. And, although having experienced rapid urbanization, Brazil was able to avoid the Latin American hyper-urbanization trap, in which one-fourth to one-third of a country's population lives in a single city. With 10 cities of more than 1 million people, Brazil has been able to lessen the difficulties of providing jobs and urban services while concentrating consumer demand in centralized regional urban markets.

> ***Predominately young and still growing, Brazil's population offers marketers an expanding class of consumers with rising purchasing power.***

STILL GROWING, BUT MORE SLOWLY

Brazil experienced rapid population growth after 1950 as mortality declined and fertility remained high. Death rates declined rapidly during the 1950s due to the spread of public health measures and the prevention and treatment of infectious diseases. Prior to 1965, a Brazilian woman would bear six children on average. Growth slowed in the 70s and 80s, after the average number of lifetime births per woman began to fall due largely to socioeconomic development and family planning efforts. By 1980, the average number of lifetime births per woman had fallen to 3.8, down from an average of 6.2 children in the 50s and 60s. Brazil's annual average population growth rate, which had been 2.33 percent during the 1930s and

*See the May 1982 issue of **International Demographics** for in-depth consumer information about Brazil.*
Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

1940s, jumped to 3.04 percent between 1950 and 1965 and then declined to 2.38 percent between 1965 and 1985.

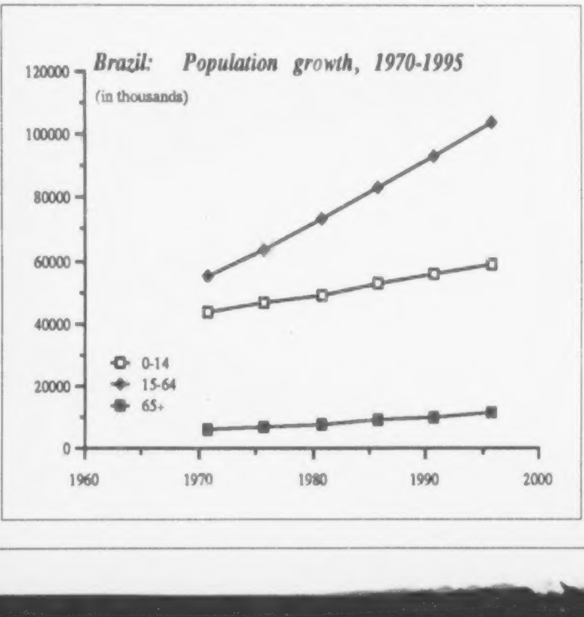
Despite Brazil's substantial decline in the number of children a Brazilian woman will bear in her lifetime, Brazil's population will continue to grow due to the demographic momentum of its large and youthful population base and its still well-above replacement-level fertility of 3.8 children per woman. Brazil has an extra-large proportion of young people in or about to enter the childbearing ages due to past high fertility. Brazil's population is estimated to grow from 143 million in 1986 to 246 million in 2025--a rise of 100 million people in 40 years.

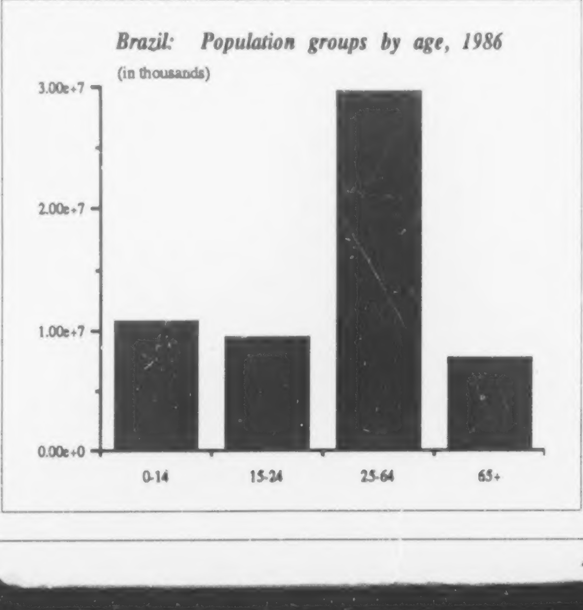
Maintaining or improving per capita income for the Brazilian people in light of these numbers is a major task. To maintain per capita income, economic growth must equal population growth. Brazil's past rack record says it can be done. Brazil maintained high rates of economic growth, even with high population growth until the early 1980s, although unequal distribution of income is an ongoing problem. Parts of the northeast are as poor as West Africa, parts of the south as affluent as Spain and Italy.

YOUNG AND ACTIVE CONSUMERS

Brazil's youth population, those aged 15 to 24, is beginning to make its impact. The disproportionate number of babies born between 1960 and 1980 are entering the job market now. They will continue to do so for the remainder of the 1980s and throughout the 1990s, putting increased pressure on urban job markets and housing for new families, while driving up the market for consumer durables. About 27.5 million, or 20 percent of Brazil's 135.5 million people, now fall in this category.

How these new households consume can be in part predicted by previous household consumption patterns of Brazilian families. Low-income Brazilians spend a large proportion of their household budget on food--as much as 45 percent of their total expenditure among urban families. Even so, over one-third of poor urban families owned TVs as early as 1975. Of all urban households in 1980, about three-quarters owned radios, refrigerators, and TVs. Thirty percent owned cars.





take a quick look at Brazil

POPULATION

Total population (estimated 1986) | **143,536,959**
Rate of population growth (percent) | **2.47**
Lifetime births per woman (total fertility rate) | **4.0**
Birthrate (births per 1,000) | **31.63**
Death rate (deaths per 1,000) | **6.96**
Population under 15 (percent) | **38.0**
Population aged 65 plus (percent) | **3.9**
Median age | **21.6**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **50.0**
Number of persons per square kilometer | **16**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **64/69**
Infant mortality rate (number per 1,000 live births) | **63.0**
Population per physician/per nursing person | **1,200/1,140**
Daily calorie supply per capita (calories per person per day) | **2,533**

Education

Percent literate (male/female, total percentage) | **78/74, 76**
Number enrolled in secondary education as percentage of age group (male/female) | **29/35**
Number enrolled in higher education as percentage of population aged 20-24 | **11**

Labor force

Percent of labor force in agriculture/industry/services | **31/27/42**
Percentage of population of working age (aged 15-64) | **58**
Age-dependency ratio | **68.7**

STATUS OF WOMEN

Labor force participation rate (percent) | **39**
Number enrolled in secondary education as percentage of age group | **35**
Percent of women aged 15-49 using contraceptives | **50**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **73/27**
Population of major metropolitan areas
city name | **Sao Paulo 12,588,000**
city name | **Rio de Janeiro 9,019,000**
Average annual growth in cities of 20,000 or more (percent) | **3.7**
Average annual growth in rural areas (percent) | **-1.3**
Rate of total population growth (percent) | **2.4**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$1,720**

China

THE CLIMBERS

Astronomical numbers describe China. The world's only demographic billionaire, China now houses 21 percent of the world's population. In all this talk about billions, however, it's easy to forget how poor China actually is, with an average per capita income of about $400. Yet, the Chinese economy is booming, and Asia's population billionaire is now being hailed as the development success of the 1980s.

MORE GROWTH TO COME, THEN STABILIZATION

Gone are the Maoist days of people as China's greatest resource when women averaged five to six lifetime births. With births per woman down to replacement level--2.1 in 1984--China's population growth will come to an eventual end. With 1.05 billion people at mid-1986, this is good news for the world's most populous country.

Despite its declining birthrate, China will experience large population increases until its large bulge of women of childbearing age passes beyond their reproductive years. Only then will the population stabilize.

Because of this so-called demographic momentum, the Chinese government introduced a one-child policy in 1979. If China's 270 million women of childbearing age each gave birth to two children, China would add half a billion people to its 1 billion current population in the early 21st century. Even with its one-child policy, China's population is expected to grow 51 percent from 1985 to 1995, from 1.04 billion to 1.57 billion, and then finally to stabilize.

ECONOMIC GROWTH RIVALS POPULATION GROWTH

China's post-Mao coming out has done wonders for the Chinese economy. In the short time since Nixon opened up China to the U.S., trade has gone from zero to $8 billion a year. U.S. investment has gone from nothing to $1.5 billion. GNP per capita has grown at one of the world's higest rates--an average of 4.5 percent annually during the period 1965 to 1984.

> ***Income and expenditure trend information is especially essential for business people investing in Chinese joint ventures that produce consumer goods.***

China began its extraordinary economic growth just eight years ago when Mr. Deng introduced the first of his economic reforms. Experiments with capitalism have produced encouraging results. Industrial production has more than doubled in the last 10 years. So has the production of such capital goods as machine tools, steel, power equipment, and trucks. Energy output too is way up. In trade, the value of exports has gone from less than $10 billion in 1976 to $27.3 billion in 1985, while the value of imports has quadrupled from less than $10 billion to $42.5 billion during the same time period. Grain production has risen from about 283 million metric tons in 1976 to 478 million in 1984.

And no one is doubting that China is

*See the October 1984 issue of **International Demographics** for in-depth consumer information about China. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

poised for further economic expansion. Many experts believe that it can maintain its fast-paced economic growth of the past 10 years, which averaged nearly 7 percent a year in GDP growth. This compares to Japan's 4.1 percent average annual growth in GDP over the same period. The investment outlook, too, is good. China along with India accounted for 20 percent of World Bank loans committed in 1985 and is expected to be one of the World Bank's biggest borrowers for years.

POST-1978 REFORMS BOOST LIVING STANDARDS

Boom times mean rising living standards for the average Chinese--better housing and the availability of more consumer goods. Income and wages are rising in the wake of economic reforms that unleashed a wave of entrepreneurialism and heightened production.

Nominal per capita urban incomes rose from 316 yuan in 1978 to 608 yuan in 1984, increasing by 7.4 percent annually during the same period. Rural incomes grew even faster, spurred largely by sideline production, rather than collective activities. By 1984 average net per capita income for peasants was 355 yuan, two and a half times its 1978 level.

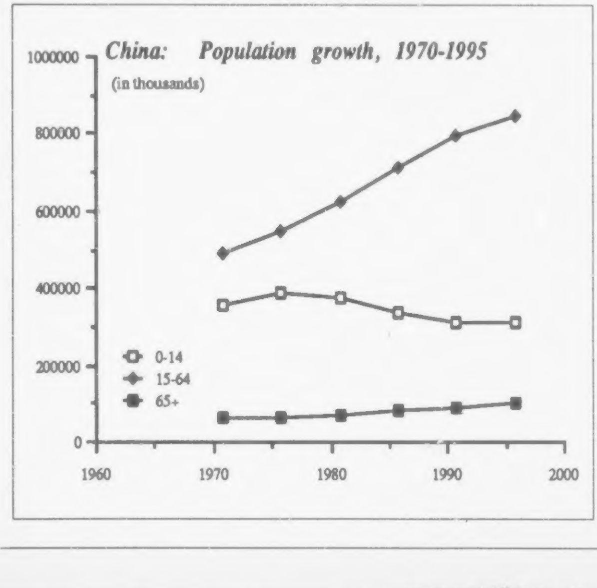
Decollectivization, higher agricultural procurement prices, and implementation of the household responsibility system have combined to narrow the gap between urban and rural income. Real per capita income for rural peasants rose 14.7 percent between 1978 and 1983, almost twice as fast as income for their urban counterparts, which increased by 7.4 percent annually during the same period.

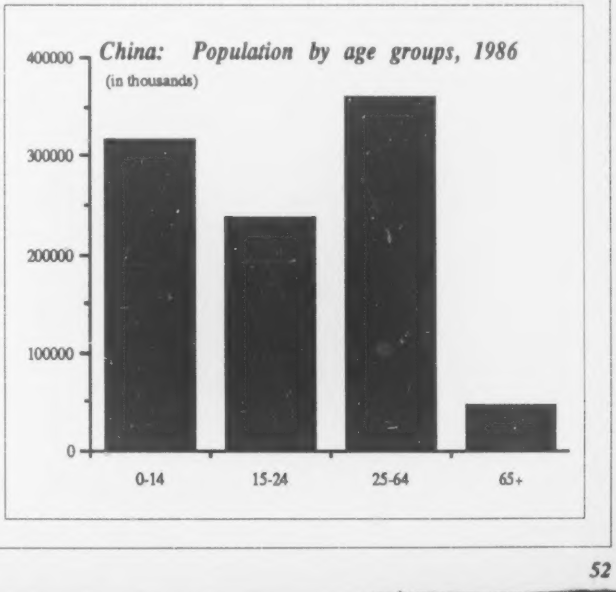
Both urban and rural income distribution shifted with impressive gains in the numbers of prosperous households. By 1984, 49 percent of urban worker and staff households had annual incomes of over 600 yuan, in contrast to only 18 percent in 1981. A similar shift occurred in the countryside. In 1983, 46 percent of peasant households earned annual incomes of 300 yuan and over, in contrast to only 7 percent of rural households in 1979.

LIMITED MARKET FOR CONSUMER GOODS AT PRESENT

The realities of China's current consumer-goods market trail behind its potential. Producer goods have made up 79 percent of all Chinese imports in recent years. Then why pay attention to consumer incomes and demand in China?

Because private consumption makes up 70 percent of all final demand in China, according to Jeffrey R. Taylor and Karen A. Hardee, authors of *Consumer Demand in China: A Statistical Factbook.* "The market for exports of consumer goods is clearly very limited now. Those who try to sell such commodities directly to China may well be frustrated. Still, an understanding of consumer income and expenditure trends for the country is essential to a successful marketing strategy for China, since consumer demand is the driving force behind demand for all commodities--including producer goods." Income and expenditure trend information is especially essential for business people investing in Chinese joint ventures that produce consumer goods.





take a quick look at China

POPULATION

Total population (estimated 1986) | **1,053,716,298**
Rate of population growth (percent) | **0.97**
Lifetime births per woman (total fertility rate) | **2.03**
Birthrate (births per 1,000) | **17.43**
Death rate (deaths per 1,000) | **7.69**
Population under 15 (percent) | **28.8**
Population aged 65 plus (percent) | **5.1**
Median age | **23.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **54.8**
Number of persons per square kilometer | **111**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **66/64/68**
Infant mortality rate (number per 1,000 live births) | **38.2**
Population per physician/per nursing person | **1,730/1,670**
Daily calorie supply per capita (calories per person per day) | **2,620**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **53/35**
Number enrolled in higher education as percentage of population aged 20-24 | **1**

Labor force

Percent of labor force in agriculture/industry/services | **69/19/12**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **55.9**

STATUS OF WOMEN

Labor force participation rate (percent) | **74**
Number enrolled in secondary education as percentage of age group | **35**
Percent of women aged 15-49 using contraceptives | **71**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **21/79**

Population of major metropolitan areas

city name | **Chongqing 14,000,000**

city name | **Shanghai 11,000,000**

Average annual growth in cities of 20,000 or more (percent) | **1.9**

Average annual growth in rural areas (percent) | **1.0**

Rate of total population growth (percent) | **0.9**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$310**

Costa Rica

THE CLIMBERS

Costa Rica is Central America's notable exception. The only Climber country in Central America, Costa Rica not only has life expectancy and infant mortality rates comparable to those of most developed countries, but a high contraception prevalence rate and a 3.4 children per woman fertility rate. In addition, medicine and education are free, with government pensions for old age, injury, and death. An impressive 26 percent of those aged 20 to 24 are enrolled in higher education and 48 percent of high school-aged students are enrolled in secondary education.

A RELATIVELY HIGH STANDARD OF LIVING

These basic demographic, educational, and health-related indicators point to a relatively high standard of living. According to the United Nations Economic Commission for Latin America, only 25 percent of Costa Ricans are poor.

However, most Costa Ricans earn little. Per capita income in 1981 was $1,476. In 1981, the most common salary range was $33 to $55 a month (earned by 25 percent of all workers). About 12 percent of workers earned $111 a month in 1981. The past 5 years have done little to improve the workers' lot. In fact, overall living standards have dropped by 12 percent in the last seven years due to austerity measures to reduce the $3.6 billion debt. Paying the interest on the foreign debt takes 30 percent of Costa Rica's export earnings.

The economic future for Costa Rica depends heavily on attracting foreign investment--not an easy goal in light of investors' fears of political turmoil in neighboring Nicaragua. However, the economy, helped along by rising prices for coffee, cheaper oil, and lower interest rates, is not doing all that badly. Inflation is a controlled 12 to 13 percent and the trade deficit should run a modest $40 to $50 million this year.

> ***Young people born in the 1960s and 1970s are now entering the job market. And they will continue to do so in disproportionately large numbers through the 1990s.***

A SMALL BUT GROWING CONSUMER MARKET

Costa Rica's 2.7 million people make up a small but growing consumer group. Although population growth has slowed since the boom years of the '50s and '60s, Costa Rica will add another million people by the year 2000.

Costa Rica experienced rapid population growth after 1950 as mortality declined and fertility remained high. Death rates declined rapidly during the 1950s due to the spread of public health measures and the prevention and treatment of infectious diseases. Prior to 1965, a Costa Rican woman would bear an average of 6.9 children. By 1985, this figure

See the January 1984 issue of International Demographics for in-depth consumer information about Costa Rica. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

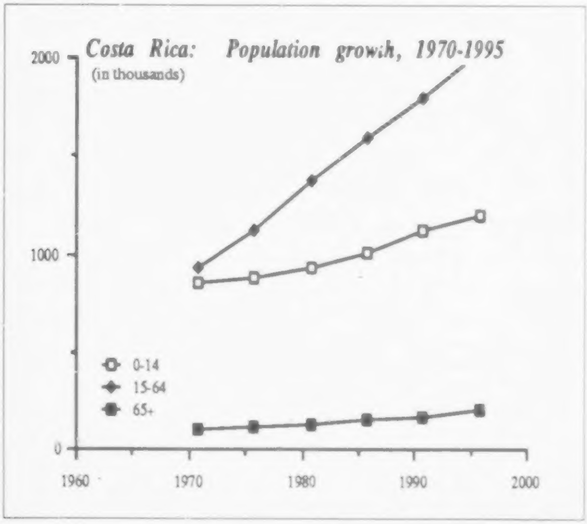
had dropped to 3.5 children due to socioeconomic development and family planning programs. As a result, growth slowed in the '70s and '80s. Costa Rica's annual average population growth rate, which had been 2.71 percent during the 1930s and 1940s, jumped to 3.64 percent between 1950 and 1965 and then declined to 2.81 percent between 1965 and 1985.

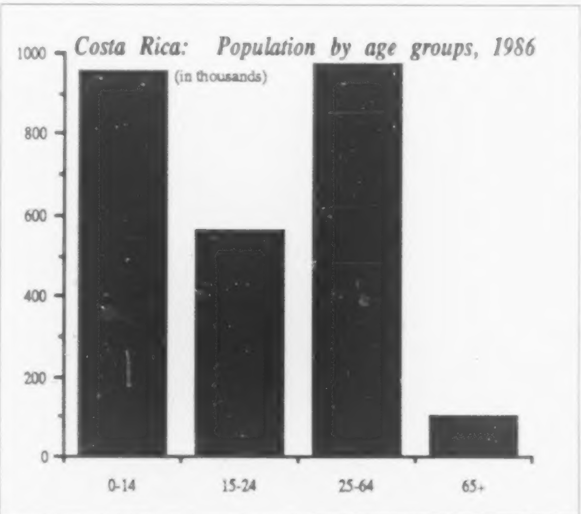
Despite reduced fertility, Costa Rica's population will continue to grow. Costa Rica's current 3.4 children per woman is well above the 2.1 children necessary for a population to replace itself. Add to this the extra-large proportions of young people entering childbearing--the legacy of past high fertility--and it comes as no surprise to hear that Costa Rica's 1986 population of 2.7 million is projected to grow to 3.4 million by the year 2000 and 4.6 million by 2020.

THE YOUTH WAVE

Like most Latin American countries, Costa Rica is young. About 37 percent of its 1985 population was under age 15. Costa Rica's high birthrates of the '50s and '60s produced a very youthful population age structure. Declining birth rates in the late 1960s, however, were responsible for reducing the proportion of youth in the population from 48 percent in 1960 to the present 37 percent.

Past high fertility puts pressure on city job markets and housing for new families now. Young people born in the 1960s and 1970s are now entering the job market. And they will continue to do so in disproportionately large numbers through the 1990s. If, as President Arias recently suggested, foreign banks reinvest part of their interest in Costa Rican export industries, or if currently prospering non-traditional exports continue doing well, Costa Rica may have a better chance at putting its surging numbers of job hunters to work.





take a quick look at Costa Rica

POPULATION

Total population (estimated 1986) | **2,734,694**
Rate of population growth (percent) | **2.82**
Lifetime births per woman (total fertility rate) | **3.38**
Birthrate (births per 1,000) | **29.32**
Death rate (deaths per 1,000) | **3.72**
Population under 15 (percent) | **36.3**
Population aged 65 plus (percent) | **3.9**
Median age | **21.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **52.0**
Number of persons per square kilometer | **51**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **72/78**
Infant mortality rate (number per 1,000 live births) | **17.4**
Population per physician/per nursing person | **NA**
Daily calorie supply per capita (calories per person per day) | **2,556**

Education

Percent literate (male/female, total percentage) | **84/83, 83**
Number enrolled in secondary education as percentage of age group (male/female) | **44/51**
Number enrolled in higher education as percentage of population aged 20-24 | **26**

Labor force

Percent of labor force in agriculture/industry/services | **31/23/46**
Percentage of population of working age (aged 15-64) | **59**
Age-dependency ratio | **68.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **17.5**
Number enrolled in secondary education as percentage of age group | **51**
Percent of women aged 15-49 using contraceptives | **65**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **45/55**
Population of major metropolitan areas
    city name | **San Jose 271,873**
    city name | **Alajuela 42,579**
Average annual growth in cities of 20,000 or more (percent) | **3.8**
Average annual growth in rural areas (percent) | **1.7**
Rate of total population growth (percent) | **2.82**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$1,190**

Mexico

THE CLIMBERS

Mexico began the developing-country debt drama in 1982. Since then Mexico's debt rescheduling program has lessened the debt crisis to a more manageable level by cutting government spending, increasing taxes, devaluing the exchange rate, and curbing demand. By 1985, the government had cut spending by 25 percent in real terms, halving the budget deficit as a proportion of the GNP. And to deal with external debt, Mexico cut imports between 1982 and 1985 by $8 billion.

In response to these austerity measures, the real earnings of an industrial worker fell about 40 percent and the economy contracted sharply. Per capita consumption fell by -1.4 percent annually between 1980 and 1984. GDP fell by -0.7 percent annually over the same period, making people poorer and putting political pressure on the government. Solutions seem more to provide breathing space than any real way out of what appears to be a chronic economic problem.

Mexico's demographics only aggravate this situation. Hyper-urbanized (22 percent of Mexicans live in Mexico City) and young (40 percent of Mexicans are under age 15), Mexico faces an ongoing struggle to provide urban housing and jobs. Rapid urbanization has left 65 percent of Mexico's population living in urban areas, up from 26 percent in 1950.

Before the early 1970s when the Mexican government introduced family planning, the average Mexican woman had 6.8 lifetime births. The population grew rapidly from about 27 million people in 1950 to 43.5 million in 1965 as deaths declined due to the introduction of modern medicine.

Between 1950 and 1965, the population grew at an average annual rate of 3.09 percent. Population growth slowed to 2.98 percent between 1965 and 1985, as lifetime births fell to 4.6 per woman between 1980 and 1985. Fertility is projected to fall further to 2.9 lifetime births per woman in the year 2000 and 2.3--near replacement level--in 2010.

> ***Rapid urbanization has left 65 percent of Mexico's population living in urban areas, up from 26 percent in 1950.***

However, due to population momentum, the population will continue to grow rapidly from 70 million in 1980 to 112 million in the year 2000 as the high proportions of Mexican youth enter childbearing ages.

JOB CREATION AN ENORMOUS TASK FOR MEXICAN INDUSTRY

Each year between 700,000 and 800,000 young people look for work in Mexico. Most look in the city. While Mexico's total population increases at about 2 percent a year, the labor force--those working or looking for work--grows at about 3.4 percent.

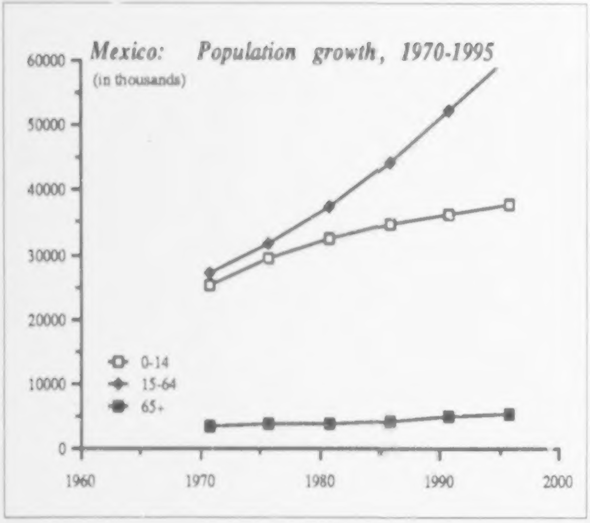
With youth populations growing especially rapidly due to past high fertility and declining mortality, current strong pressure on city job markets and housing will continue into the

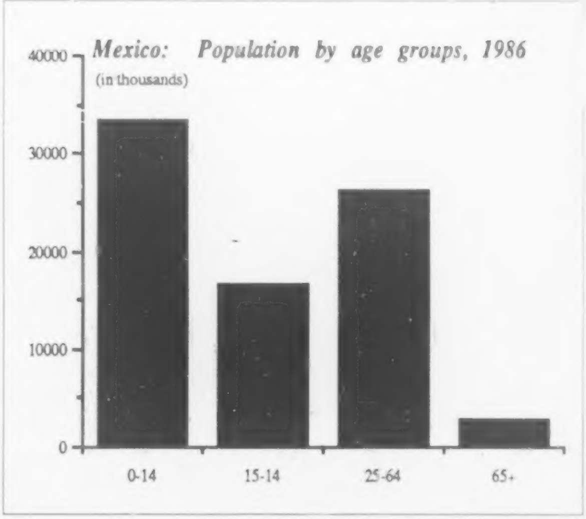
*See the October 1982 issue of **International Demographics** for in-depth consumer information about Mexico. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

next century with the number of people aged 15 and over working or looking for work expected to more than double between 1980 and the year 2000, from 20 million to 42 million. About 20 percent of Mexico's 1985 population was aged 15 to 24. A whopping 42 percent was under age 15.

Job growth must happen in the cities. With urban population tripling from 30.5 million in 1970 to 84.6 million in the year 2000, and the nonagricultural labor force quadrupling, the demand for urban jobs will be an ongoing problem. In addition, fulfilling the expectations of youth fed by increased education and media exposure in an economy characterized by a high-income modernized sector and a large informal sector is extremely difficult.

Mexico's past track record does not give rise for any high hopes. World Bank figures from 1977 (the Mexican census does not ask about income) show that the top 20 percent of households controlled 58 percent of total income (of which the top 10 controlled 41 percent), with the bottom 20 percent of households controlling only 3 percent of total income. Unequal income distribution combined with hyper-urbanized population distribution aggravate Mexico's job market outlook.





take a quick look at Mexico

POPULATION

Total population (estimated 1986) | **80,171,097**
Rate of population growth (percent) | **2.07**
Lifetime births per woman (total fertility rate) | **3.54**
Birthrate (births per 1,000) | **28.77**
Death rate (deaths per 1,000) | **5.64**
Population under 15 (percent) | **40.4**
Population aged 65 plus (percent) | **4.0**
Median age | **18.4**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.0**
Number of persons per square kilometer | **40**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **70/67/73**
Infant mortality rate (number per 1,000 live births) | **42.9**
Population per physician/per nursing person | **1,140/NA**
Daily calorie supply per capita (calories per person per day) | **2,934**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **52/49**
Number enrolled in higher education as percentage of population aged 20-24 | **15**

Labor force

Percent of labor force in agriculture/industry/services | **28**
Percentage of population of working age (aged 15-64) | **49**
Age-dependency ratio | **48**

STATUS OF WOMEN

Labor force participation rate (percent) | **00**
Number enrolled in secondary education as percentage of age group | **00**
Percent of women aged 15-49 using contraceptives | **00**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **70/30**
Population of major metropolitan areas
city name | **Mexico City 14,750,182**
city name | **Guadalajara 2,467,657**
Average annual growth in cities of 20,000 or more (percent) | **3.6**
Average annual growth in rural areas (percent) | **0.5**
Rate of total population growth (percent) | **2.1**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,040**

Peru

THE CLIMBERS

Peru is in trouble. Between 1980 and 1984, average annual growth rates for GDP, exports, imports, investment, and per capita consumption were all down. GDP fell by -0.7 percent annually; exports by -0.6; imports by -10.8; investment by -5.3 percent; and per capita consumption by -3.7 percent. And no one was happy when Peru announced its intention of limiting its debt-service payments to 25 percent of its export earnings. Peru's debt crisis has played a large part in dragging Peru's real per capita income level back to what it was in 1965.

Peru's problems are not new, although they came to the fore when the Latin American debt crisis began. Public-sector loans made to Peru between 1970 and 1985 for the most part financed food imports and military expenditures. Analysts estimate that only about 10 percent of the loans were used productively to create jobs. Further exacerbating this picture was Peru's penchant for employing many new workers in government rather than in private-sector jobs. About half of all salaried workers sit behind government desks.

FAST GROWING, YOUTHFUL POPULATION KEEPS UP DEMOGRAPHIC PRESSURES

Peru's demographic picture compounds its economic problems. Peru's consistently high fertility combined with rapidly dropping mortality due to the introduction and widespread dissemination of modern medicine after World War II led to sustained rapid population growth. In 1950, Peru's population numbered 7.6 million people. By 1970, the population had surged to 13.1 million, and by 1986 to 20.2 million people.

And although the population growth rate is slowing and the birthrate edging downwards, the disproportionately large numbers of youth entering their childbearing ages well into the 21st century will keep up the already great population pressures. The population growth rate is expected to fall from its present 2.5 percent to about 2.1 percent in the year 2000. However, population will continue to climb from its current 20.2 million to 28.1 million in the year 2000 and 40.3 million in 2020.

> ***One out of three Peruvians lives in Peru's mega-city, Lima.***

Peruvian women in the1950s commonly bore about seven children. By the early 1970s, the number of lifetime births had fallen to about six births per woman. It was not until the early 1980s that fertility had come down to five children per woman--still a very high fertility rate.

What all this adds up to is a very youthful population, slated to remain so well into the 21st century. About 40 percent of all Peruvians are under age 15. This proportion will remain high although it will decrease somewhat to about 36 percent of the total population in the year 2000. Picking up the slack will be the proportion of the population of work-

*See the June 1983 issue of **International Demographics** for in-depth consumer information about Peru. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

ing ages. Those aged 15 to 64, who now make up about 56 percent of Peru's total population, are expected to increase to 60 percent of the population in the year 2000. The proportion of those over 65 will remain small, reaching 4.3 percent of the total population in the year 2000, up from 3.6 percent of the total population at present.

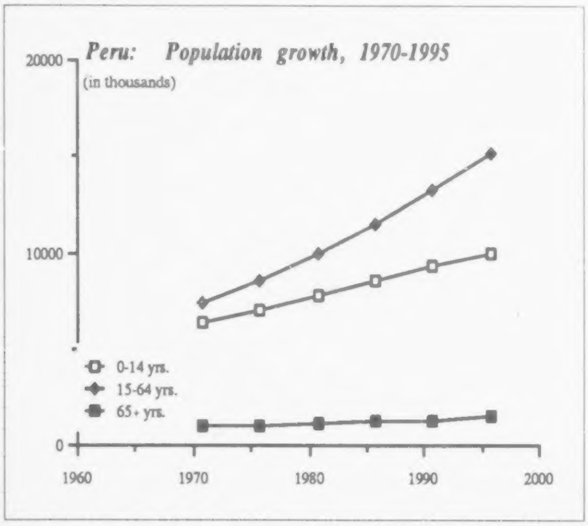
ONE OUT OF THREE PERUVIANS LIVES IN PERU'S MEGA-CITY, LIMA

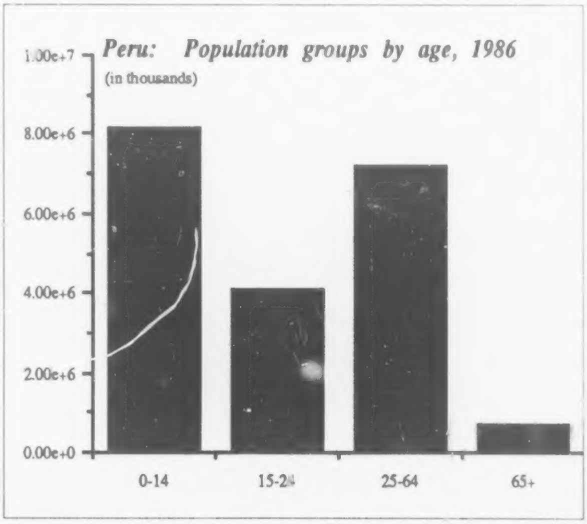
All these young people entering their childbearing and family formation years will place severe pressures on already stressed urban job markets, services, and housing. Much of the pressure will mount in Peru's capital city of Lima.

Lima is Latin America's sixth largest metropolitan area--with about 4.5 million people in Peru's 1981 census year--and commands a disproportionate share of Peru's population and wealth. Accounting for nearly 30 percent of Peru's entire population and about 42 percent of its urban population in 1981, Lima typifies the uniqueness of Latin America's urban system. Compared to other developing regions in the world, Latin America is city- rather than village-oriented. By far the most urbanized of the world's developing regions, Latin America is characterized by large-city growth.

Lima is typical of such growth. Lima's 1940 population represented about 10 percent of the total Peruvian population. By 1961, this proportion had risen to 18 percent, by 1972 to about 24 percent, and nearly 30 percent in 1981. Although this trend continues, Lima's urban primacy is waning, due to the growth of some regional centers like Trujillo and Chimbote. Nevertheless, Lima is still almost 10 times as large as the country's next ranking cities, Trujillo on the northern coast and Arequipa in the south.

Lima's predominance is not limited to population alone. It is Peru's most economically important area, accounting for 43 percent of Peru's GDP, 70 percent of its industrial income, 66 percent of its labor force, and 95 percent of all financial transactions. However, Lima's rapid urban growth puts increasingly severe pressures on the city's services, housing, and job market, leading to extreme differences in lifestyle between rich and poor.





take a quick look at Peru

POPULATION

Total population (estimated 1986) | **20,218,258**
Rate of population growth (percent) | **2.56**
Lifetime births per woman (total fertility rate) | **4.64**
Birthrate (births per 1,000) | **35.16**
Death rate (deaths per 1,000) | **9.62**
Population under 15 (percent) | **40.4**
Population aged 65 plus (percent) | **3.6**
Median age | **19.4**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.1**
Number of persons per square kilometer | **15**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **59/63**
Infant mortality rate (number per 1,000 live births) | **91.1**
Population per physician/per nursing person | **NA**
Daily calorie supply per capita (calories per person per day) | **1,997**

Education

Percent literate (male/female, total percentage) | **83/62, 73**
Number enrolled in secondary education as percentage of age group (male/female) | **62/52**
Number enrolled in higher education as percentage of population aged 20-24 | **22**

Labor force

Percent of labor force in agriculture/industry/services | **40/18/42**
Percentage of population of working age (aged 15-64) | **56**
Age-dependency ratio | **78.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **14**
Number enrolled in secondary education as percentage of age group | **52**
Percent of women aged 15-49 using contraceptives | **41**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **67/33**
Population of major metropolitan areas
city name | **Lima Callao 4,420,000**
city name | **Truijillo 342,000**
Average annual growth in cities of 20,000 or more (percent) | **3.5**
Average annual growth in rural areas (percent) | **0.9**
Rate of total population growth (percent) | **2.56**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$1,000**

Portugal

THE CLIMBERS

Portugal's entry last year into the European Community is expected to change life in that country, albeit slowly. But it has a long struggle before it becomes an Ultimate Consumer, as are most of its EC country counterparts.

IMPORTANCE OF AGRICULTURE

About a quarter of the labor force in Portugal work in agriculture, but even that is not enough to produce the food that its residents need. Most of the farms are small, and even the large farms are ill-equipped and inefficient. Half of its food must be imported even in good times, so it is likely that upgrading of agriculture will be high on the agenda of this country in the next few years.

Because it must compete with others in the EC, Portugal must upgrade and modernize its food packaging and processing equipment. When people first begin to increase their incomes, one of their first priorities is to purchase a greater variety of foods, in more convenient forms and packages. If Portugal's own producers are not to lose market share to other EC countries, they must be able to either add value to imported foods or provide more attractive food from their own farms and processors.

Only 41 percent of the labor force work in services, a relatively low proportion compared with other EC countries. No doubt this field will grow relatively quickly, again as Portuguese industry attempts to modernize and compete with other EC firms. Computerization will be necessary in many cases as will upgrading to meet new regulations and expectations.

About 35 percent of Portugal's labor force work in manufacturing. The textiles industry is especially important to the economy, but it too needs modernization in order for Portugal to take advantage of its new position in the Community.

> ***Households in Portugal are less likely to have the amenities commonly found in the households of other European countries.***

THE RURAL LIFE

Nearly 69 percent of Portugal's 10 million people live in rural areas. Its largest city is Lisbon with about 812,000 people. The next largest is Oporto with about 330,000. The rest of its cities have fewer than 100,000 inhabitants. Even so, its population density is 111 persons per square kilometer, making it similar in density to more advanced and populous countries such as France, and slightly more crowded than neighboring Spain.

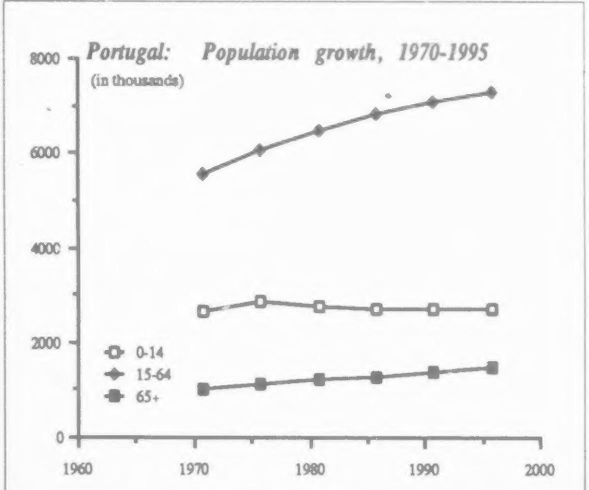
Households in Portugal are less likely to have the amenities commonly found in the households of other European countries. The rural character of Portugal is responsible in part for the fact that only 73 percent of households are served by electricity, only 58 percent have piped-in water, 63 percent a toilet, and 47 percent a shower or bath. Nearly 100 percent of new homes have piped water and a bathroom, even though only 4 percent have central heating. Space-heating equipment could be an important consumer item in Portugal for some time.

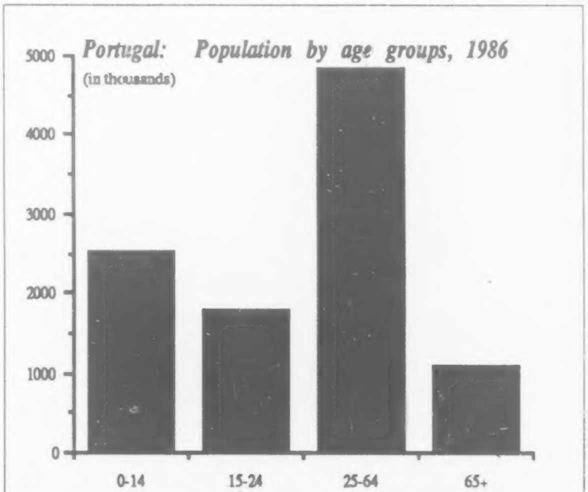
Households in Portugal do not have high rates of ownership of consumer goods. Sixty-six percent of households have a black and white television, but only 17 percent have a color television. About 70 percent of households have a refrigerator, but only 15 percent have a deep freeze. About 30 percent of households have a washing machine. Less than half of households own items such as electric shavers, sewing machines, and record players.

PORTUGAL'S YOUNG

An EC country's interest in health care is usually a reflection of growing concern about caring for its aging population. In the case of Portugal, however, there is a focus on improving primary health care for the entire population, a quarter of which is aged 0 to 14. Only about 11 percent of the population is aged 65 and over. Life expectancy is age 68 for men and 75 years for women.

The median age is 30 years, so a quarter of the population are in the prime years for secondary education and for the pairing and nesting that leads to the creation of households. This significant pool of people entering their years of household formation just as Portugal becomes affiliated with the European Community could open up a sizeable market for household furnishings, small and large appliances, and consumer electronics, many of which are not now manufactured in Portugal.





take a quick look at Portugal

POPULATION

Total population (estimated 1986) | **10,129,000**
Rate of population growth (percent) | **0.65**
Lifetime births per woman (total fertility rate) | **2.1**
Birthrate (births per 1,000) | **17.1**
Death rate (deaths per 1,000) | **9.7**
Population under 15 (percent) | **25**
Population aged 65 plus (percent) | **11**
Median age | **30.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.8**
Number of persons per square kilometer | **110**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71, 68/75**
Infant mortality rate (number per 1,000 live births) | **20**
Population per physician/per nursing person | **450/NA**
Daily calorie supply per capita (calories per person per day) | **3,046**

Education

Percent literate (male/female, total percentage) | **78/65, 71**
Number enrolled in secondary education as percentage of age group (male/female) | **54/56**
Number enrolled in higher education as percentage of population aged 20-24 | **11**

Labor force

Percent of labor force in agriculture/industry/services | **25/35/40**
Percentage of population of working age (aged 15-64) | **64**
Age-dependency ratio | **54.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **53**
Number enrolled in secondary education as percentage of age group | **56**
Percent of women aged 15-49 using contraceptives | **66**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **31/69**

Population of major metropolitan areas

city name | **Lisbon 807,167**

city name | **Uporto 327,368**

Average annual growth in cities of 20,000 or more (percent) | **1.8**

Average annual growth in rural areas (percent) | **0.2**

Rate of total population growth (percent) | **0.6**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$1,970**

Puerto Rico

THE CLIMBERS

Although officially part of the U.S., many U.S. companies include Puerto Rico among their international markets. Puerto Rico's population is now young, but it won't remain that way for long. As fertility continues to decline and the baby boomers enter the ranks of the elderly, the proportion of those aged 65 and over will increase dramatically by 2025.

The proportion of the elderly will increase from about 8 percent in 1980 to an estimated 12.5 percent in 2025. At the same time, the proportion of the young--those aged under 15--is expected to drop from 31.6 percent in 1950 to roughly 21.4 percent in 2025.

Puerto Rico belongs to the group of youthful Climber countries in which both fertility-the number of children a woman would commonly bear in her lifetime--and mortality began to decline in the 1950s. In the 1950s, women commonly bore 5 children. By the early 1970s, however, 3 children was the norm. The fertility rate between 1980 and 1985 averaged 2.6 children per woman. This trend is expected to continue with fertility dropping further to 2.1 children per woman in the year 2000.

But Puerto Rico's population will not stabilize at this time even though couples will be bearing only enough children to reproduce themselves. Due to large numbers of those born in past high fertility periods in or entering their childbearing ages, the population is projected to grow from an estimated 3.4 million in 1985 to 4.2 million in the year 2000 and 5.2 million in 2025.

However, outmigration is an important factor when working with future population estimates for Puerto Rico. Puerto Rico has been growing at a relatively slow pace in recent years due partly to net outmigration. Puerto Rico's 1983 population, for example, was 3.3 million people. Between 1980 and 1983, Puerto Rico's population grew by 70,000 people. This change was made up of 229,000 births and 69,000 deaths, with a loss of 90,000 people through migration. The growth rate for the period 1980 to 1983 was a relatively low 2.2 percent, partly due to this high net outmigration.

> ***Puerto Rico belongs to the group of youthful Climber countries in which both fertility and mortality began to decline in the 1950s.***

URBAN GROWTH OUTPACES RURAL GROWTH

Urban and rural areas show many differences.The countryside is more youthful and households are larger than those found in the cities. In 1980, those under age 18 made up about 37 percent of the total urban population, but 42 percent of the rural population. Median age was younger in rural than urban areas--22.5 years and 25.6 years respectively. Household size was larger in rural areas with an average of 4 persons per household as compared to 3.5 persons in the cities. The cities accounted for about twice as many households as the countryside--599,535 and 268,162 households respectively in 1980.

Urban growth far surpassed rural growth between 1970 and 1980. In just 10 years, urban areas grew by about 36 percent while rural areas decreased in population by about 7 percent. This trend is expected to continue with the percentage of the population living in urban areas projected to grow from 67 percent of the total population in 1980 to 85 percent of the population in the year 2000.

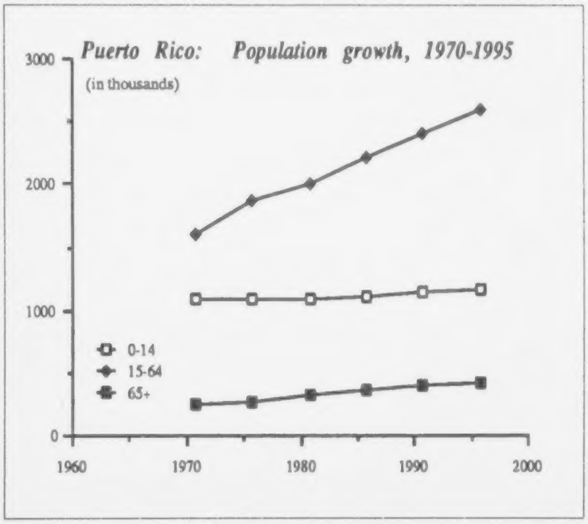
Nearly 2.6 million people lived in Puerto Rico's metropolitan areas in 1983, and 690,000 lived in nonmetro areas. Puerto Rico has four metropolitan statistical areas. The fastest growing in the early 1980s was Mayaguez on the western coast. It grew 4.8 percent between 1980 and 1983. Despite its high growth rate, however, Mayaguez has a total population of only 210,000.

Aguidilla grew only about 0.5 percent during the period to reach 153,500 people. The Arecibo Metropolitan Statistical Area (MSA) grew 1.6 percent to 162,900 people, and the largest MSA, Ponce, grew by 1.7 percent to 236,400 people.

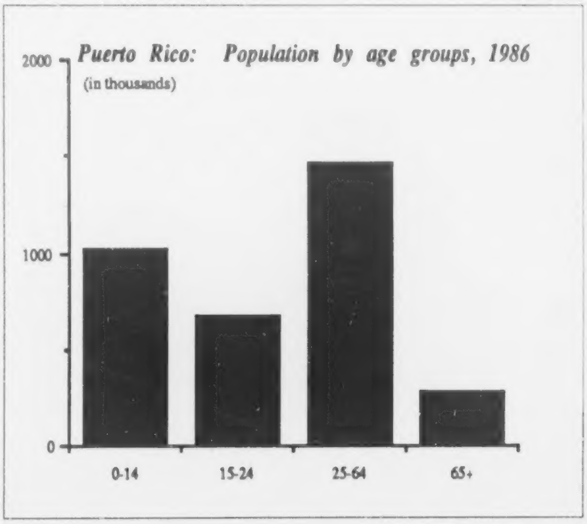
The only Consolidated Metropolitan Statistical Area (CMSA) is San Juan-Caguas with a population of 1.8 million residents. The fastest growing areas within the San Juan Primary Metropolitan Statistical Area (PMSA) between 1980 and 1983 include the city of Loiza, up 17.8 percent to 24,600 people; Rio Grande , up 9 percent to 37,400 people; Florida, up 7.8 percent to 7,800 people; Humacao, up 6.4 percent to 49,200 people; Corozal, up 6.4 percent to 30,000 people; Toa Alta, up 5.5 percent to 33,700 people; Dorado, up 5.4 percent to 26,900 people; and Juncos, up 5.2 percent to 26,700 people.

HOUSING SHOWS IMPROVEMENT

Multi-unit structures and mobile homes are increasingly housing Puerto Rico's growing population. Between 1970 and 1980, the number of households living in single-family homes grew by 33 percent while households in multi-unit structures increased 65 percent. The number of households living in mobile homes or trailers increased by over 100 percent. By 1980, about 16 percent of Puetro Rican homes had air conditioning.


Puerto Rico: Population growth, 1970-1995

(in thousands)


Puerto Rico: Population by age groups, 1986

(in thousands)

take a quick look at Puerto Rico

POPULATION

Total population (estimated 1986) | **3,304,316**
Rate of population growth (percent) | **0.81**
Lifetime births per woman (total fertility rate) | **2.14**
Birthrate (births per 1,000) | **18.74**
Death rate (deaths per 1,000) | **6.60**
Population under 15 (percent) | **29.9**
Population aged 65 plus (percent) | **8.5**
Median age | **25.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **51.3**
Number of persons per square kilometer | **388**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **74/71/78**
Infant mortality rate (number per 1,000 live births) | **18.1**
Population per physician/per nursing person | **907/256**
Daily calorie supply per capita (calories per person per day) | **NA**

Education

Percent literate (male/female, total percentage) | **89/87, 88**
Number enrolled in secondary education as percentage of age group (male/female) | **NA**
Number enrolled in higher education as percentage of population aged 20-24 | **NA**

Labor force

Percent of labor force in agriculture/industry/services | **5/18/77**
Percentage of population of working age (aged 15-64) | **61.6**
Age-dependency ratio | **61.2**

STATUS OF WOMEN

Labor force participation rate (percent) | **25**
Number enrolled in secondary education as percentage of age group | **NA**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **71/29**

Population of major metropolitan areas

city name | **San Juan 434,800**

city name | **Ponce 236,400**

Average annual growth in cities of 20,000 or more (percent) | **2.6**

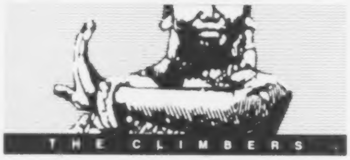
Average annual growth in rural areas (percent) | **-0.9**

Rate of total population growth (percent) | **0.8**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$5,573**

South Korea



South Korea was on the move in 1986, and 1987 looks even better. As the 50 percent stronger yen slowed the Japanese economy, South Korea took up a good part of the slack and enjoyed an 18 percent rise in exports in the first 8 months of 1986. Helped along by a devalued won, a 30 percent fall in oil imports in dollar terms, and low interest rates, South Korea earned its first-ever trade surplus. Experts say inflation-adjusted growth for 1986 should come to nearly 10 percent. Growth in 1987 will beat out all others in the region except that of Taiwan.

South Korea not only gained a tremendous competitive price advantage as the price of Japan's exports rose on world markets but will reap long-term investment rewards as Japan increasingly relocates manufacturing operations to Korean soil. Investment capital, new sources of employment, and the transfer of technologies are added coups.

All this goes hand in hand with government aims to build an economy based on emerging technologies. To speed its transfer to high technology, the government has targeted microelectronics, telecommunications, automobiles, pharmaceuticals, and new materials. However, Korean officials readily admit that Korea will need to import many of the necessary technologies from Japan, the U.S., or Western Europe.

Some of this good news is tempered by rising production costs for manufacturers using Japanese-supplied parts. In addition, sustaining such an economic boom depends to a great extent on the uncertain fate of oil prices, U.S.-South Korea trade relations, and the strength of the won. Trouble spots include North Korea's army--now the 7th largest in the world, possible protectionist backlash as Hyundai follows in Toyota's footsteps, and South Korea's unstable political climate.

But no one doubts that South Korea will enjoy vigorous economic growth in 1987. In general, South Koreans are certain to be better off in 1987, especially since inflation has so far been held in check.

> ***Past rises in the standard of living have been nothing short of astounding.***

SWIFTLY RISING STANDARD OF LIVING

Past rises in the standard of living have been nothing short of astounding. Per capita GNP soared from $80 in 1962 to $2300 in 1986, with the number of people below the poverty line decreasing from 40.9 percent of the population to 12.3 percent. Per capita GNP grew an average of 5.9 percent annually between 1982 and 1986. Private consumption grew at 5.5 percent annually during the same period. In addition, unequal income distribution is slowly giving way. The income share of the bottom 40 percent of households rose from 15.4 percent in 1978 to 17.5 percent in 1986.

Korea's health services have also shown

See the April 1982 issue of ***International Demographics*** *for in-depth consumer information about South Korea. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

marked improvement in the six short years since 1980. More Koreans are covered by medical insurance and industrial accident insurance than ever before. About 66 percent of all Koreans are covered by medical insurance, up from only 30 percent in 1980. Forty-one percent of industrial workers are now covered by industrial accident insurance, up from 26 percent in 1980. Population per physician has decreased from 1485 persons per physician in 1980 to 1275 persons per physician in 1986.

South Korea began implementing population policies in the early 1960s, when 5.4 lifetime births per woman were the norm. By 1986, lifetime births per woman had fallen to 2.4--near the 2.1 births per woman necessary for a population to just replace itself. South Korea's 1986 population of 41.3 million people gives the country one of the highest population densities in Asia, second only to Bangladesh.

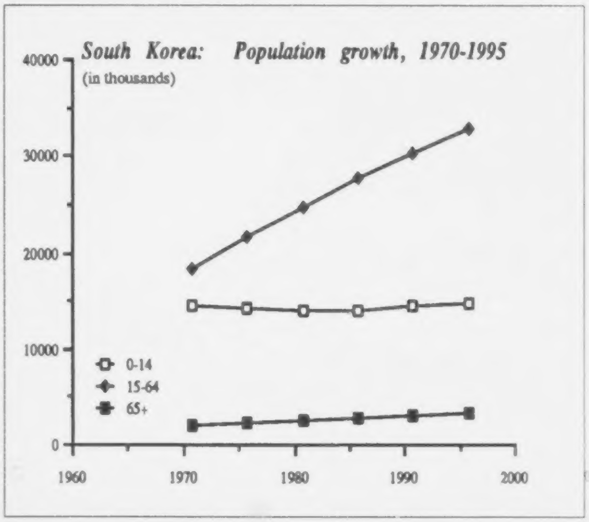
BABY BOOMERS FUEL POPULATION GROWTH AND CONSUMPTION

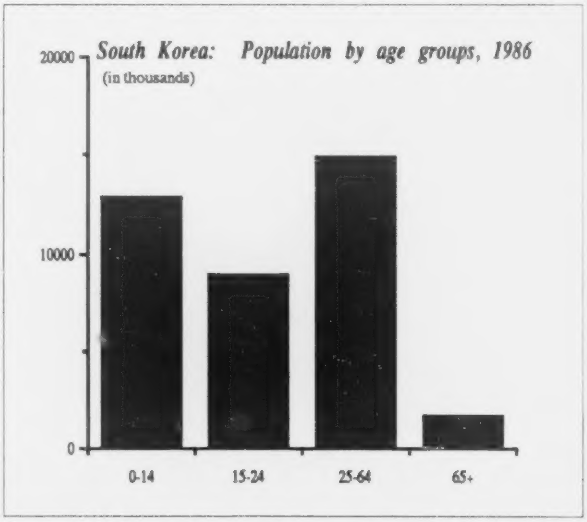
South Korea is dominated by an increasingly educated youth and a growing middle class. South Korea's demographic picture indicates expanding potential markets for overseas imports as the disproportionately large group of Korean baby boomers enter their prime spending years. Korean baby boomers number about 14 million, representing about 23 percent of the total population.

Baby boomers entering their primary childbearing years will fuel continued population growth although the number of lifetime births per woman has already fallen to replacement level. Korea's 1986 population of about 60.9 million is expected to grow to 76.7 million by the year 2000 and 92.6 million by 2020.

Korea has a relatively young population, with a median age of just 23.2 years in 1986. About 32 percent of the population was under age 15 in 1985. The proportion of the population in their prime spending years (15 to 64) will increase from 63 percent of total population to 66 percent by the year 2000 and just over 69 percent by 2020.

The market potential for imports is expected to hold some promise as household income follows South Korea's rising economic fortune. However, it is important to note that spending patterns are influenced greatly by the Korean penchant for higher education. After the average monthly industrial wage of $325 is portioned out for necessities, the rest is often invested in education as only primary schooling is provided free of charge. With 80 percent of Koreans of secondary school age enrolled in secondary education, this trend is pervasive.





take a quick look at South Korea

POPULATION

Total population (estimated 1986) | **41,349,866**
Rate of population growth (percent) | **1.54**
Lifetime births per woman (total fertility rate) | **2.47**
Birthrate (births per 1,000) | **22.38**
Death rate (deaths per 1,000) | **6.21**
Population under 15 (percent) | **30.9**
Population aged 65 plus (percent) | **4.1**
Median age | **22.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **54.0**
Number of persons per square kilometer | **281**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **68/65/72**
Infant mortality rate (number per 1,000 live births) | **27.0**
Population per physician/per nursing person | **1,440/350**
Daily calorie supply per capita (calories per person per day) | **2,765**

Education

Percent literate (male/female, total percentage) | **95/81, 88**
Number enrolled in secondary education as percentage of age group (male/female) | **89/80**
Number enrolled in higher education as percentage of population aged 20-24 | **24**

Labor force

Percent of labor force in agriculture/industry/services | **36/27/37**
Percentage of population of working age (aged 15-64) | **65**
Age-dependency ratio | **60.2**

STATUS OF WOMEN

Labor force participation rate (percent) | **41**
Number enrolled in secondary education as percentage of age group | **80**
Percent of women aged 15-49 using contraceptives | **58**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **65/35**
Population of major metropolitan areas
 city name | **Seoul 8,366,756**
 city name | **Gyeongsangbug Do 4,962,375**
Average annual growth in cities of 20,000 or more (percent) | **4.2**
Average annual growth in rural areas (percent) | **-1.8**
Rate of total population growth (percent) | **1.5**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,300**

Taiwan

THE CLIMBERS

Next year Taiwan is to have one of Asia's fastest growing economies, according to area experts. Already, this year's growth is nearly twice last year's rate of 4.4 percent. Taiwan's recent growth spurt is due largely to the competitive price advantage its exports gained over Japanese exports. The yen's rapid rise against the dollar left Japanese goods more expensive on world markets. Taiwan took good advantage of this situation, with their overseas sales in the first nine months of 1986 rising 24 percent over last year's sales. Lower prices for oil and other raw materials helped.

Growth prospects may be threatened, however, by protectionist feeling in the U.S. The U.S. buys half of Taiwan's exports. In addition, Taiwan's high level of foreign-exchange reserves--about $40 billion--could not only raise American ire abroad but spur inflation at home.

No one doubts however that Taiwan's economic performance in 1987 will be vigorous. Taiwan's Council of Economic Planning and Development forecasts GNP growth of about 8 percent. And long-term growth will benefit from the increased employment, capital investment, and transfer of technologies as Japanese manufacturers move their production facilities abroad.

Taiwan too is poised to become more than somebody else's manufacturing site. Long a manufacturing colony of the U.S. and Japan, Taiwan is setting its sights on designing, producing, and marketing its own proprietary products.

AN EXPANDING MIDDLE-CLASS MARKET

Demographic projections for Taiwan indicate expanding markets for overseas imports as household income rises with Taiwan's economic fortune. Per capita GDP growth, which grew by an average of 7.6 percent between 1976 and 1986, far outstripped Taiwan's population growth which hovered around 2.2 percent in the 1970s and 1.9 percent in the early 1980s. And although Taiwan's population growth is slowing from 2.2 percent growth in 1971 to 1.9 percent in 1981, the population will continue to grow from its estimated 1986 population of 19.5 million people to 24.6 million by the year 2000 and 33.3 million by 2020.

> ***Every year the average Taiwanese gets richer, at a rate almost three times as fast as the average American.***

Taiwan's population is relatively young with one out of every two Taiwanese under age 24. However, with the number of lifetime births per woman projected to decrease from 2.3 in 1980 to 2.07 in 2005 (just under replacement level of 2.1 births per woman), the proportion of children (aged under 15) and youth (aged 15 to 24) in the total population will fall steeply by the year 2000. Both of these groups will increase in actual

*See the March 1984 issue of **International Demographics** for in-depth consumer information about Taiwan. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

numbers, although their share of the total population will fall, from 32 percent of the total population in 1980 to 23 percent of the total population in 2005 for children aged under 15, and from 22 percent of the total population in 1980 to 16.8 percent of the total population in 2005 for youth aged 15 to 24. Concurrently, those aged 60 and over will increase proportionately, from 6.8 percent of the total population in 1980 to 11.4 percent of the total population in 2005.

GETTING RICHER

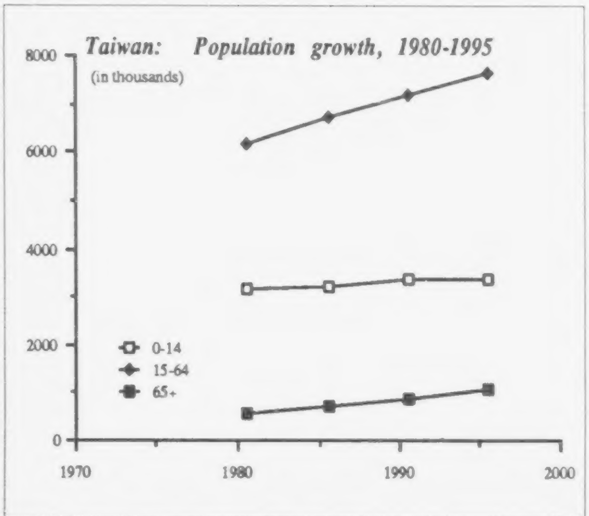
Every year the average Taiwanese gets richer, at a rate almost three times as fast as the average American. Even so, today's Taiwanese are a lot poorer than their American counterparts, with average incomes less than one-fifth of those in the U.S. But, if real incomes in the two countries continue to grow at their present rates of 2 percent a year for Americans and just over 6 percent a year for Taiwanese, by the year 2023 Taiwanese will be richer than Americans.

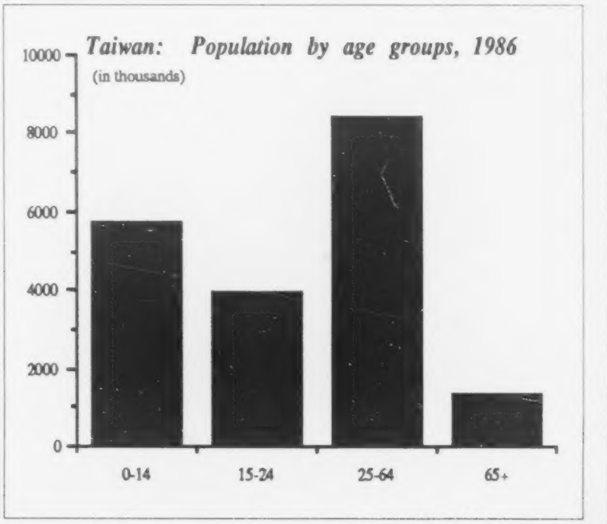
Part of the trend toward expanding household incomes comes from increased women's participation in the workforce. About 40 percent of Taiwanese women work--a rate comparable to West Germany's 39 percent, Korea's 42 percent and Singapore's 45 percent.

TAIWAN'S BRAIN DRAIN CREATES TALENT-POOL PROBLEM

The Taiwanese call them CEO's--Chinese Entrepreneurs Overseas. But what are they really? CEO's are the 50,000 nationals who went overseas for an education and never returned. The big reason they stay away is money--technical professionals abroad can earn much more than the $400 a month a Taiwanese electrical engineer makes at home.

Another reason is the country's lack of seats in its institutions of higher learning for Taiwan's well-schooled, ambitious youth--well-schooled because of the high value Chinese culture puts on education, ambitious because of the long-touted Chinese entrepreneurial spirit. At present, universities can only accommodate one-third of Taiwan's high school grads. And although great strides have been made in increased enrollment of children at older ages--59 percent of those aged 12 to 14 were enrolled in 1980, up from only 34 percent in 1966--college-age enrollments have remained fairly consistent, with 16 percent of those aged 18 to 24 in college in 1980, an increase of only 2 percent over 1966.





take a quick look at Taiwan

POPULATION

Total population (estimated 1986) | **19,525,242**
Rate of population growth (percent) | **1.258**
Lifetime births per woman (total fertility rate) | **1.84**
Birthrate (births per 1,000) | **17.61**
Death rate (deaths per 1,000) | **4.87**
Population under 15 (percent) | **29.0**
Population aged 65 plus (percent) | **5.1**
Median age | **NA**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **55.3**
Number of persons per square kilometer | **530**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **73/71/76**
Infant mortality rate (number per 1,000 live births) | **18.8**
Population per physician/per nursing person | **858/320**
Daily calorie supply per capita (calories per person per day) | **NA**

Education

Percent literate (male/female, total percentage) | **93/79, 86**
Number enrolled in secondary education as percentage of age group (male/female) | **NA**
Number enrolled in higher education as percentage of population aged 20-24 | **16**

Labor force

Percent of labor force in agriculture/industry/services | **18/33/49**
Percentage of population of working age (aged 15-64) | **65.9**
Age-dependency ratio | **NA**

STATUS OF WOMEN

Labor force participation rate (percent) | **40**
Number enrolled in secondary education as percentage of age group | **NA**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **65/35**
Population of major metropolitan areas
    city name | **Taipei 2,388,300**
    city name | **Kaohsiung 1,227,454**
Average annual growth in cities of 20,000 or more (percent) | **NA**
Average annual growth in rural areas (percent) | **NA**
Rate of total population growth (percent) | **1.23**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,360**

Thailand

THE CLIMBERS

Thailand benefited greatly in 1986 from the sudden rise in the yen, as did other Asian exporters as South Korea, Hong Kong, and Taiwan. Rising prices for Japanese goods on world markets gave Thailand's goods a welcome price advantage, especially during a time of lowered world prices for its leading exports of rice, rubber, maize, tapioca, shrimp, tin, sugar and textiles. Overseas sales of manufactured goods increased by 22 percent in the first six months of 1986, according to the Bank of Thailand. This manufactured-goods export boom along with falling oil prices and interest rates led to a 5 percent growth rate in 1986--one expected to be repeated in 1987.

Experts predict that as overseas demand for Thai exports drops, domestic urban demand will fill in. Home buying should surge as domestic interest rates fall. The chief economist of the Bangkok Bank sees housing construction as a shot in the arm for the Thai economy in 1987. But the recession in export prices has already hit Thailand's internal economy, causing, for example, a drop in car sales of 10 percent in the first four months of 1986.

A YOUNG EXPANDING MARKET

Thailand's population is predominantly young, with 35 percent of the population under age 15. Another 22 percent are between the ages of 15 and 24. This means that about one out of every two Thais are under age 24. Due to sustained high fertility in the 1960s and 1970s, the Thai population will remain basically young well into the 21st century.

The number of lifetime births per woman fell from 6.2 children per woman in the 1960s, to 4.6 children per woman in the 1970s, and about 3.5 children in the early 1980s. Although the average number of lifetime births per woman has fallen to a low of 2.5 in 1986, the population will continue to grow as the large number of persons born during past high fertility periods reach their childbearing ages.

> ***Despite a rapid decline in fertility and population growth rates, rapid urbanization and rural-to-urban migration present serious ongoing problems forThailand.***

Thailand's 1986 population of 52.7 million people is projected to grow to 65.5 million in the year 2000 and 81.5 million in 2020. Fertility is not expected to reach replacement level--the 2.1 children needed to stabilize population growth--until 2010.

RAPID URBANIZATION CAUSES PROBLEMS

Despite a rapid decline in fertility and population growth rates, rapid urbanization and rural-to-urban migration present serious ongoing problems for Thailand. Although Thailand is still mainly agricultural, with only 16 percent of Thais living in urban areas, the

See the December 1983 issue of ***International Demographics*** *for in-depth consumer information about Thailand. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

rate of urban growth outpaces that of population growth and the urban population tends to concentrate in the primate city of Bangkok--which now holds 62 percent of Thailand's urban population.

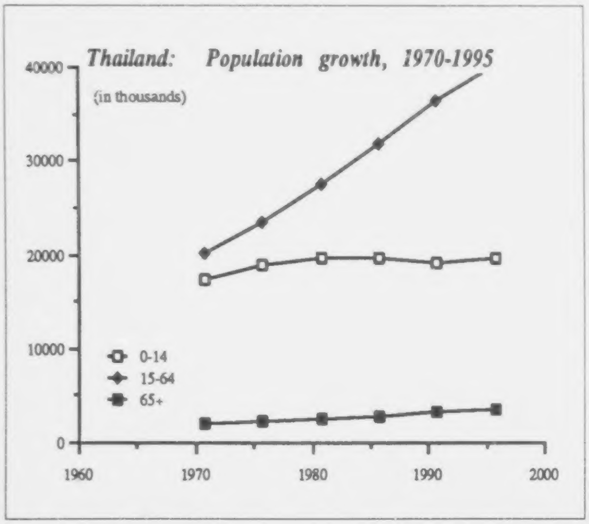
Young Thais migrate to urban areas in search of higher wages and a better standard of living than the countryside provides. Bangkok only houses about 10 percent of the total population, but it gobbles up one-third of the national income. Thirty-eight percent of urban dwellers in 1980 owned motorcycles (rural, 14.7 percent), 21.3 percent owned cars (rural, 1.1 percent), 67 percent owned black and white TVs (rural, 9.1 percent), 10.9 percent owned color TVs (rural, 0.4 percent), 56.4 percent owned sewing machines (rural, 18 percent), and 61.3 percent owned refrigerators (rural, 6.2 percent). Rural residents only beat out urban dwellers in bicycle ownership, with 45.1 percent owning bicycles in comparison to 38.7 percent of their urban counterparts. Per capita income in 1985 was about $860.

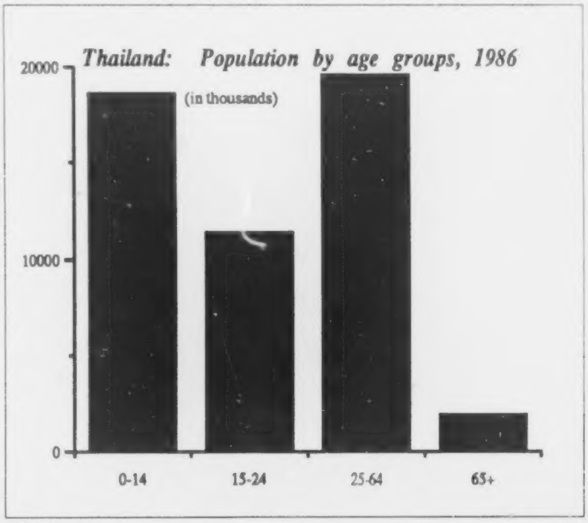
UNEMPLOYMENT LOW, BUT UNDEREMPLOYMENT RAMPANT

Forty-five percent of Thais were employed in the census year of 1980. Only 2 percent were looking for work, and 18 percent were waiting for seasonal agricultural work. Among women aged 11 and over, 57 percent were economically active, with 40 percent employed, 2 percent looking for work, and 16 percent waiting for seasonal agricultural work. In 1980, 72.6 percent of all Thai workers worked in agriculture. In Bangkok, 53 percent of the population was employed.

A more recent survey reports that 24.6 million persons were in the labor force, or 52 percent of the population in 1981. Nearly 99 percent of these people were employed, with only 1 percent unemployed. However, about 20 percent of all workers--about 5 million--are underemployed.

Women fare better than men in Bangkok's professional world. Twelve percent of women versus 7 percent of men are professionals. They also hold a greater proportion of clerical and related jobs, sales positions, and service jobs than men do.





take a quick look at Thailand

POPULATION

Total population (estimated 1986) | **52,699,238**
Rate of population growth (percent) | **1.80**
Lifetime births per woman (total fertility rate) | **2.48**
Birthrate (births per 1,000) | **25.49**
Death rate (deaths per 1,000) | **7.51**
Population under 15 (percent) | **35.0**
Population aged 65 plus (percent) | **3.8**
Median age | **20.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **52.2**
Number of persons per square kilometer | **100**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **61/67**
Infant mortality rate (number per 1,000 live births) | **54.1**
Population per physician/per nursing person | **6,770/2,140**
Daily calorie supply per capita (calories per person per day) | **2,330**

Education

Percent literate (male/female, total percentage) | **87/70, 79**
Number enrolled in secondary education as percentage of age group (male/female) | **30/27**
Number enrolled in higher education as percentage of population aged 20-24 | **22**

Labor force

Percent of labor force in agriculture/industry/services | **70/10/20**
Percentage of population of working age (aged 15-64) | **59**
Age-dependency ratio | **66.6**

STATUS OF WOMEN

Labor force participation rate (percent) | **64.6**
Number enrolled in secondary education as percentage of age group | **27**
Percent of women aged 15-49 using contraceptives | **63**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **16/84**

Population of major metropolitan areas

city name | **Bangkok 4,999,515**

city name | **Chiang Mai 97,839**

Average annual growth in cities of 20,000 or more (percent) | **3.8**

Average annual growth in rural areas (percent) | **1.8**

Rate of total population growth (percent) | **1.8**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$860**

Philippines

THE CLIMBERS

The Philippine economy reflects the uncertainty of the year-old Corazon Aquino government. Experts remain tentative about how well it will do in 1987. Pessimists look at two years of contraction totaling nearly 10 percent and predict more of the same. Optimists see a 6 percent expansion in both 1987 and 1988. But no one expects the sustained spectacular growth of the 1970s to repeat itself in the rest of the 1980s. And the Philippines still must cope with its most troublesome $26 billion overseas debt, which absorbs 40 percent of its export earnings.

The Philippines may have to settle for moderate growth or no growth at all for the next few years. World prices for its main exports--coconut oil, sugar, and metal ores--have fallen. New industry is badly needed. The government wants to spend heavily to spur the economy by building roads, bridges, schools, and irrigation systems to the tune of $190 million. Aquino's surprising success with the U.S. Congress and President Reagan will help--America will give $200 million in aid and the International Monetary Fund $800 million. That billion will no doubt help Aquino as she struggles with the economy, communist groups, and quarrelling ministers.

STANDARD OF LIVING NOSE DIVES

Despite the overall positive performance of the Philippine economy in the last decade--GDP grew at an annual rate of 2.3 percent, jumping from $18 billion to $26.6 billion between 1976 and 1986--recent years have not been good for the average Filipino. Due to declines in world prices for Philippine sugar and copper, the high price of servicing the overseas debt, a flight of capital, and a decline in both domestic and overseas investment, GDP growth, which averaged 5.1 precent annually during the 1960s and 6 percent annually during the 1970s, began its decline to 3.2 percent in 1983 and -5.5 in 1984.

> ***At present, 60 percent of all Filipino households are considered below poverty level, or unable to meet basic needs.***

In response, mean family income declined about 46 percent in real terms since 1981. Per capita GNP in 1986 was only $660, and, as in most Climber countries, income distribution remains uneven, with the highest 20 percent of households garnering about 50 percent of total income.

At present, 60 percent of all Filipino households are considered below poverty level, or unable to meet basic needs. Demographic pressures exacerbate this picture. And recent findings point to some disturbing demographic trends, not the least of which is a turnaround of what appeared to be a successful family planning program to slow population growth.

EIGHTH LARGEST POPULATION IN ASIA,17TH IN WORLD

Family planning, which increased substantially in the 1970s, stalled in the 1980s.

The 1983 National Demographic Survey found the National Population Program unable to cope with the increasing numbers of women entering their childbearing ages. As a result, desired changes in the reproductive behavior of Filipino couples have not taken place.

Rapid population growth has been an ongoing problem for the Philippines since post-war mortality rates decreased and the average number of lifetime births for Filipino women remained high. In 1975, the average number of lifetime births stood at 5.2. Fertility declined to 4.7 children per woman in 1986. However, this number of lifetime births per woman is still well above the 2.1 children per woman needed to simply replace the population.

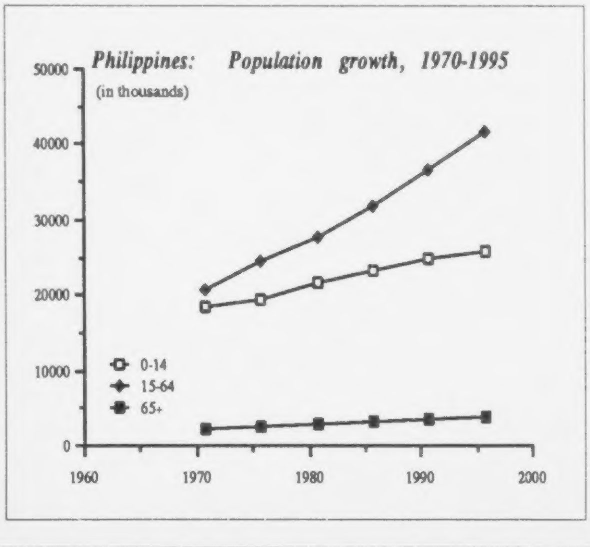
Because of continued high fertility, the population will continue to grow rapidly, from 59.8 million in 1986 to 85.5 million in the year 2000 and 107 million in 2010, placing unrelenting demographic pressures on the country. Fertility should decline to about 4.1 births per woman by the year 2000, but not enough to even come close to stabilizing the population.

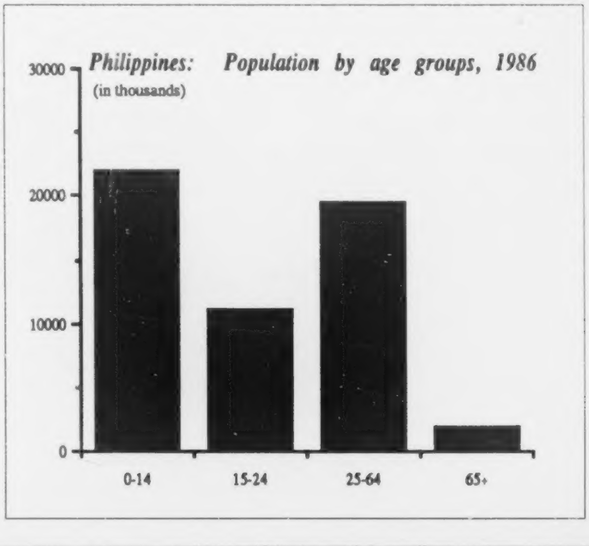
YOUTH ADD PRESSURE TO URBAN JOB MARKET AND HOUSING

A major source of concern is the pressure for urban jobs and housing as the disproportionately large group of Filipino youth enter their childbearing ages. At present about 41 percent of the population is under 15. More important for short-term job market expansion is the 20 percent of the total Filipino population aged 15-24.

Adequately employing the growing numbers of those just entering the labor force is a major task for the struggling Filipino economy. In just 14 years, the 30 million people over age 15--of which 19 million are in the labor force--will swell to about 47 million, with an estimated labor force of almost 32 million. Providing an additional 13 million jobs in a short 14-year span when the current 19 million workers are not yet adequately employed is an unreachable goal.

The effects are already showing up. Metro Manilla reported a 16.3 percent unemployment rate in 1986 with about 43 percent of those working considered underemployed. In addition, because of the high cost of land, low household incomes, and a scarcity of housing finance, at least two-thirds of all new housing in Manilla is illegal and uncontrolled, according to government estimates.





take a quick look at Philippines

POPULATION

Total population (estimated 1986) | **59,884,309**
Rate of population growth (percent) | **2.71**
Lifetime births per woman (total fertility rate) | **4.76**
Birthrate (births per 1,000) | **35.39**
Death rate (deaths per 1,000) | **7.08**
Population under 15 (percent) | **41.0**
Population aged 65 plus (percent) | **3.3**
Median age | **20.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.6**
Number of persons per square kilometer | **182**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **62/68**
Infant mortality rate (number per 1,000 live births) | **51.4**
Population per physician/per nursing person | **2,150/2,590**
Daily calorie supply per capita (calories per person per day) | **2,357**

Education

Percent literate (male/female, total percentage) | **84/81, 83**
Number enrolled in secondary education as percentage of age group (male/female) | **56/68**
Number enrolled in higher education as percentage of population aged 20-24 | **26**

Labor force

Percent of labor force in agriculture/industry/services | **52/16/33**
Percentage of population of working age (aged 15-64) | **56**
Age-dependency ratio | **71.5**

STATUS OF WOMEN

Labor force participation rate (percent) | **48**
Number enrolled in secondary education as percentage of age group | **68**
Percent of women aged 15-49 using contraceptives | **48**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **40/60**
Population of major metropolitan areas
city name | **Manila 1,630,500**
Average annual growth in cities of 20,000 or more (percent) | **3.7**
Average annual growth in rural areas (percent) | **1.7**
Rate of total population growth (percent) | **2.7**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$660**

Turkey

THE CLIMBERS

At today's rate of population growth, Turks will outnumber all other European nationalities in about five years. Only the USSR will have a larger population in the area. Despite the legalization of abortion in 1983, Turkish women commonly bear four children, still a hefty brood even considering that women in the early 1960s commonly bore six children.

All these young Turks are giving a government bent on industrialized prosperity the willies. So shocked were government leaders at the results of the 1980 census, that they called for a combination of public- and private-sector initiatives to promote family planning. Clinics are to be set up in rural areas (where fertility rates are the highest) to dispense contraceptives. And in a pilot project, 13 factories will employ a doctor and a nurse to provide family planning advice and supplies to workers, most of whom are women.

Turkish hopes for population control have a good chance of being realized. For one, they do not run counter to the aspirations of most women. In a recent survey, 80 percent said they wanted only three children. And most religious leaders have no objection to contraceptive measures other than sterilization and abortion. (IUDs and the pill are popular contraceptives.)

With these initiatives in mind, the U.S. Census Bureau's Center of International Research expects the average number of births per women in Turkey to fall to 3.6 births by 1990 and to about 3 births by the year 2000. The population, however, will continue to grow rapidly due to the large groups of youth born during periods of past high fertility entering their childbearing years. This population momentum will push Turkey's total population from its 1986 figure of 51.8 million people to 56.5 million in 1990 and 68. 5 million in the year 2000. By 2020, the population is expected to almost double.

> ***Such demographic pressure presents Turkey with the enormous task of providing jobs and housing for large groups of youth as they enter their reproductive years and form new families.***

DEMOGRAPHIC PRESSURES STRESS URBAN JOB MARKET AND HOUSING

Such demographic pressure presents Turkey with the enormous task of providing jobs and housing for large groups of youth as they enter their reproductive years and form new families. Unfortunately, this is a problem that won't go away quickly. Turkey's population under age 15 now stands at about 38 percent of the population. This proportion will only decrease slightly to 36 percent of the total population in 1990 and about 34 percent of the total population in the year 2000. Counting the proportion of the total population aged 15 to 24 in 1985 of 18.3 percent, those under 25 make up about 55 percent of the total population.

*See the December 1982 issue of **International Demographics** for in-depth consumer information about Turkey. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

These demands will be further complicated by the trend toward increased urbanization. At present, about 48 percent of Turkey's population live in urban areas and 52 percent live in rural areas. Urban areas will soon outdistance rural ones with 58 percent of the total Turkish population projected to live in urban areas by the year 2000. By 2020, seven out of ten Turks will live in cities.

RISING PURCHASING POWER

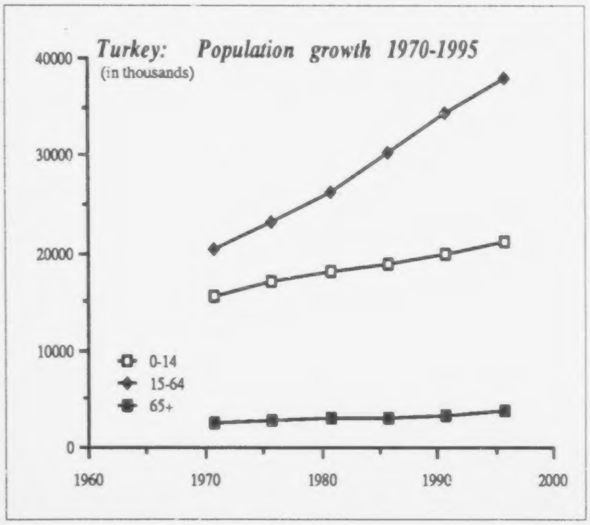
Turkey's GNP is growing at about 6 percent a year, with the industrial sector leading the growth. And although inflation runs at about 25 percent annually, the economy is growing in real terms. Both private consumption and domestic investment are increasing at about 2 percent a year. What all this adds up to is rising personal incomes and the prospect of greater demand for consumer goods.

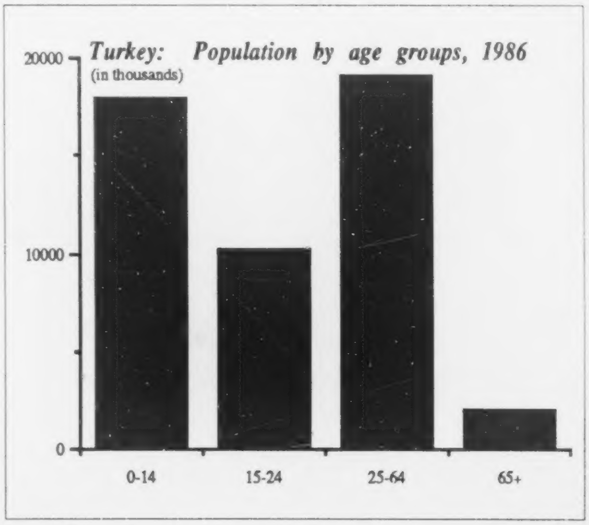
ONE OUT OF TWO TURKS ARE FARMERS

Turkey's total labor force numbered 17.9 million people in 1985. The number of those employed or looking for work is expected to increase from 18.6 million to about 21 million people in 1990.

In 1984, 60.3 percent of the Turkish labor force worked in agriculture; 12.2 percent worked in mining and manufacturing; and 3.8 percent worked in construction. About 24 percent of workers held jobs in the wholesale and retail trade; transport, storage, and communications; finance, insurance, real estate; and community, social, and personal services.

A large proportion of the labor force is made up of those under age 20--21.6 percent in 1984--due partly to the agricultural nature of work in Turkey. Women accounted for about 36 percent of the labor force in 1984. Women worked mainly in agriculture or home-based businesses.





take a quick look at Turkey

POPULATION

Total population (estimated 1986) | **51,818,056**
Rate of population growth (percent) | **2.25**
Lifetime births per woman (total fertility rate) | **4.04**
Birthrate (births per 1,000) | **31.52**
Death rate (deaths per 1,000) | **9.06**
Population under 15 (percent) | **38.0**
Population aged 65 plus (percent) | **4.3**
Median age | **21.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.4**
Number of persons per square kilometer | **64**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **61/64**
Infant mortality rate (number per 1,000 live births) | **88.9**
Population per physician/per nursing person | **1,500/1,240**
Daily calorie supply per capita (calories per person per day) | **3,100**

Education

Percent literate (male/female, total percentage) | **77/43, 60**
Number enrolled in secondary education as percentage of age group (male/female) | **57/28**
Number enrolled in higher education as percentage of population aged 20-24 | **7**

Labor force

Percent of labor force in agriculture/industry/services | **58/17/25**
Percentage of population of working age (aged 15-64) | **58**
Age-dependency ratio | **70.5**

STATUS OF WOMEN

Labor force participation rate (percent) | **49.4**
Number enrolled in secondary education as percentage of age group | **28**
Percent of women aged 15-49 using contraceptives | **38**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **48/51**
Population of major metropolitan areas
    city name | **Istanbul 2,772,708**
    city name | **Ankara 1,877,255**
Average annual growth in cities of 20,000 or more (percent) | **3.8**
Average annual growth in rural areas (percent) | **1.1**
Rate of total population growth (percent) | **2.25**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$1,160**

Venezuela

THE CLIMBERS

Despite economic stagnation, Venezuela counts many firsts in comparison to its Latin American counterparts. It continues to have the highest per capita GNP ($4,140 in 1982), the highest standard of living, and the highest per capita energy consumption. It also continues to be the second most important U.S. trading partner in Latin America after Mexico.

Venezuela is just coming out of a devastating economic crisis. Reduced oil income--down 30 percent since 1981--combined with debt-servicing and balance of payment problems were the major culprits in stalling economic growth. Government readjustment and austerity measures have helped bottom out the impact of reduced oil earnings. Oil earnings remain substantial, however, and Venezuela continues to be an important export market for the U.S.

ONE OF LATIN AMERICA'S FASTEST GROWING POPULATIONS

Between 1971 and 1981, only Guatemala, Honduras, Nicaragua, and Ecuador grew faster than Venezuela. During this period, the Venezuelan population growth rate was a surging 3.11 percent, down from the annual 3.61 percent of the period 1961 to 1971, and the incredible 3.72 percent a year during the 1950s.

Like most of its neighbors, Venezuela experienced rapid population growth in the 1950s due to high fertility and rapidly falling death rates. In the 1950s and '60s, the average Venezuelan woman bore 6.5 children. By 1985, the average number of lifetime births per woman had fallen to 4.1, though still way above the 2.1 children needed for a population to replace itself.

Urban growth outstripped population growth, averaging 5.8 percent annually during the period 1950 to 1980. By 1981, 84 percent of Venezuelans lived in urban areas.

> ***Venezuela has the highest per capita GNP, the highest standard of living, and the highest per capita energy consumption in Latin America.***

Venezuela's current population of 17.8 million people is projected to more than double by 2025, rising to 24.7 million by the year 2000 and to nearly 38 million by 2025. Because of Venezuela's youthful population (39 percent of the 1986 population is under age 15) great pressure is already being put on city job markets and housing for new families, as Venezuela's disproportionate numbers of youth enter childbearing ages. This trend will continue well into the 1990s.

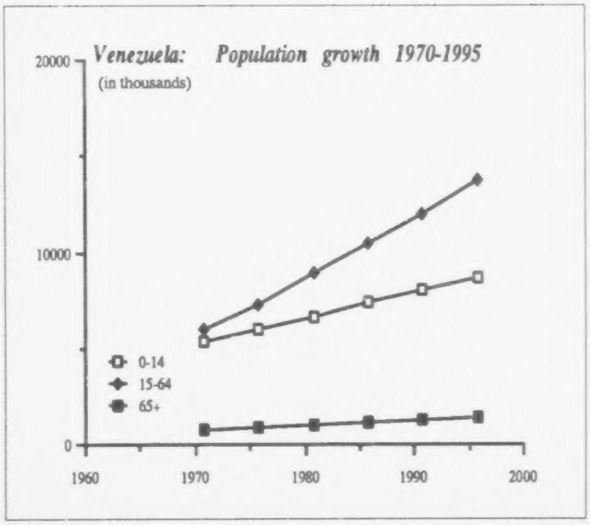
Increased joblessness affects primarily young men entering the workforce. The official unemployment rate for metropolitan Caracas was 6 percent in 1980 and 5.7 percent in 1981. Since then, unemployment has been on the rise. The unemployment rate for men age 15 to 24 in metropolitan Caracas reached more than 20 percent in 1983.

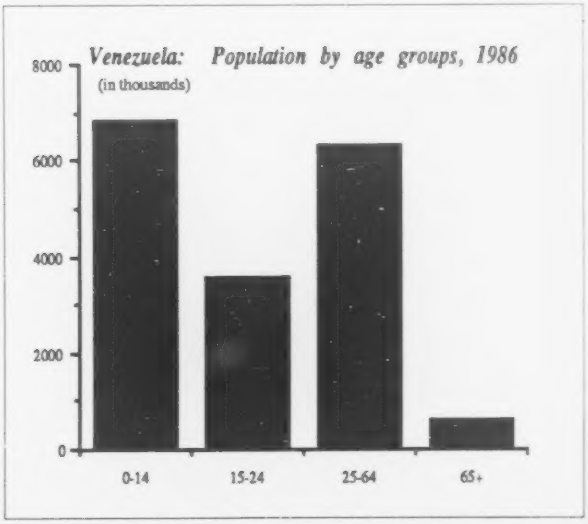
See the June 1985 issue of ***International Demographics*** *for in-depth consumer information about Venezuela. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

AN AMERICAN-ORIENTED LIFESTYLE

Relatively high incomes give Venezuelans access to an American life style. One in every eight Venezuelans owns a private car. In 1980, 94 percent of all homes had a radio and 79 percent a TV. And, in that same year, Venezuelans spent nearly $1.6 billion on tourism abroad.

Venezuelans have high incomes by Latin American standards. However, income inequality is great. Thirty-seven percent of families in metropolitan Caracas, 46 percent of those in urban Venezuela, and 80 percent in the rural areas live below the poverty level. In 1980, the median wage of an urban worker was $400 a month. Total household incomes amounted to $895 per month in metropolitan Caracas, $752 in urban Venezuela as a whole, and $376 in the rural areas.





take a quick look at Venezuela

POPULATION

Total population (estimated 1986) | **17,810,214**
Rate of population growth (percent) | **2.7**
Lifetime births per woman (total fertility rate) | **3.89**
Birthrate (births per 1,000) | **31.65**
Death rate (deaths per 1,000) | **5.6**
Population under 15 (percent) | **39.2**
Population aged 65 plus (percent) | **3.5**
Median age | **19.9**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.7**
Number of persons per square kilometer | **19**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **69/66/72**
Infant mortality rate (number per 1,000 live births) | **39.6**
Population per physician/per nursing person | **930/NA**
Daily calorie supply per capita (calories per person per day) | **2,451**

Education

Percent literate (male/female, total percentage) | **80/73, 77**
Number enrolled in secondary education as percentage of age group (male/female) | **41/38**
Number enrolled in higher education as percentage of population aged 20-24 | **22**

Labor force

Percent of labor force in agriculture/industry/services | **16/28/56**
Percentage of population of working age (aged 15-64) | **58**
Age-dependency ratio | **75.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **24**
Number enrolled in secondary education as percentage of age group | **38**
Percent of women aged 15-49 using contraceptives | **49**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **84/16**
Population of major metropolitan areas
    city name | **Caracas 2,944,000**
    city name | **Maracaibo 901,000**
Average annual growth in cities of 20,000 or more (percent) | **3.5**
Average annual growth in rural areas (percent) | **-1.2**
Rate of total population growth (percent) | **2.7**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$4,140**

THE ULTIMATE CONSUMERS

Ultimate Consumers are called upon to make choices at every turn. Gone are the days when there was only one type of iron, washing machine, or coffee pot on the market. For the most part, the Ultimate Consumers have conquered the Three C's--the majority of their populations have cars, coolers (air conditioners), and color televisions. They are the producers of these goods and others that they use in their daily lives.

Present-day Ultimate Consumers like high-quality imports and, in some cases, are good markets for the machinery to produce these items or parts of some of the items. Price is important because the same countries that bombard the United States with low-priced imports--Brazil, South Korea, Taiwan, and India--also target the other Ultimate Consumers. But because these are countries where the consumers are well-educated, have relatively high disposable incomes, and have the necessities of their lives under control, they are attracted to imports. For example, stores in Paris that have "America" in their name, are especially appealing to the young.

These are the countries whose natural population growth is slowing, but because they are so wealthy by international standards, they attract thousands of immigrants every year--some legally and some illegally. Most of their birthrates are near replacement level, but even if birthrates dropped far below replacement level, the populations of Ultimate Consumer countries will continue to grow if they allow immigration.

THE HIGH AND THE LOW OF ULTIMATE CONSUMER COUNTRIES

Ultimate Consumer countries are not all alike, however. At the lower end are the Southern European countries ofItaly, Spain, Greece and Yugoslavia. These countries are still modernizing their industries and trying to raise standards of educational attainment. They are more dependent on agriculture than most other Ultimate Consumers, and they provide migrant workers who usually settle in other Ultimate Consumer countries. Emigrants from these countries work away from home mainly as unskilled laborers in order to send money to their families and provide them with a better lifestyle.

At the higher end of Ultimate Consumer countries, the proportion of those aged 65 and older is growing rapidly--although those of working age still dominate--causing a boom in the health care industry. The proportion of those aged 20 and under is decreasing slightly in most of these countries, reducing the number of entry-level workers and forcing colleges and universities to re-evaluate their policies. In some countries, more students are getting a chance to attend university. In other countries, attracting more foreign students is the answer to falling enrollments.

CHANGING FAMILY PATTERNS SET THE TRENDS

The trends that most affect consumer products in the Ultimate Consumer countries are those that reflect change in the way families live. And because women are pivotal to family life, these trends mirror changes in the lives of women.

As women take more control over their lives with the widespread availability of birth control, they have fewer children, are more likely to be in the labor force full or part-time, and have fewer ties to "kinder, kuche, and kirke"--children, kitchen, and church.

Educational attainment, for one, makes the difference. Women who have invested much of their young lives in gaining an education are less willing to leave the workforce for extended childrearing. Increasingly, women leave the workforce for shorter periods and juggle work and home. Families in which both parents are working and caring for children have a host of new needs. For them, time is money. This new type of family fuels the demand for fast foods, for convenience-oriented supermarkets and stores stocking everything from diapers to videos and pharmaceuticals, for house-cleaning services, and for child care.

Families expect to find banks, doctor's offices, and even beauty parlors open early and late. They visit dental, eye, and medical clinics that take walk-ins and deal with their needs efficiently and quickly. Even in a city like Paris where sitting in a sidewalk cafe for hours is a usual means of relaxation, *boulangeries* carry a variety of prepared foods like lasagna and stuffed peppers that can be taken home and popped into the oven by the busy householder.

Smaller families mean more disposable income per family member. With rising means, family members look for ways to express their own tastes. Stores selling Japanese bonsai and futons are found in all large cities in the Ultimate Consumer countries. Even once-unusual imports such as Scandinavian glass and Indian and Persian rugs are now considered the norm.

Households are being formed in increasing number and variety in Ultimate Consumer countries. With more control over how they live, people in the Ultimate Consumer countries have increasingly complex life courses. Men and women may find, for example, that they set up two or even three households in the course of their lives due to second or third marriages. Once-small families can become extended and larger when two divorced people marry and combine each of their own children under one roof. Businesses need to understand these new types of households in order to meet their changing needs.

WOMEN SET THE PACE OF CHANGE

What the feminist revolution did for changing the way women in the Ultimate Consumer countries see themselves, the jobs revolution will do for the way the rest of the world sees them. Women of the 1980s in Ultimate Consumer countries are increasingly choosing medicine, the law, banking, and insurance as their professions. And for the adventurous '80s woman, entrepreneurialism is a main attraction. Over 25 percent of small businesses in the U.S. are owned by women. Canadian women do even better, owning a third of all small Canadian businesses.

The demographic picture for Ultimate Consumer countries will further propel women--especially married women--into full-time work as the youthful labor pool shrinks due to dwindling birthrates. The better-educated will increasingly enter formerly male-dominated professions and the higher ranks of industry, especially the fast-growing information industry and financial services. Less-educated women will be a major source of cheap labor. But no matter where women work, the full-time, out-of-the-house commitments they make will further change family patterns and buying habits.

CHANGING TASTES AS ULTIMATE CONSUMERS AGE

As the Ultimate Consumers move into middle age, no matter what continent they live on, they worry more about their diets, their careers, and what they will leave behind.The children of the 1960s had little to protect. They wanted change. The parents of the 1980s have children, homes, careers, and for them, the status quo is fine. They look for safe investments, solid homes, cars with luxuries, vacations in unusual places, but ones where there are few surprises. They listen to music that is softer, and they favor movies about family life and middle-aged romance.

Argentina

THE ULTIMATE CONSUMERS

Argentina is a nation going backwards. The world's seventh wealthiest country in 1920, Argentina now doesn't even make the top 50. Average incomes in Argentina are now back to where they were in 1965 due to real GDP growth in Argentina falling in five of the last eight years. This compares to soaring real GDP per person in Asia's Climber countries of South Korea and Taiwan.

What happened? The boom created by European demand for Argentinean beef and grain in the late 19th century ended in the 1920s when Common Market agricultural subsidies sidelined the beef trade and made heavy cuts into grain exports. Profits from the good years were spent instead of invested or saved, and Argentina increasingly borrowed to subsidize the cities once agricultural exports declined. The result is a country which owes $50 billion to foreign creditors and in which per capita income has fallen by 16 percent since 1979.

ARGENTINIAN POPULATION GROWTH UNDER CONTROL

Although Argentina's economic picture is not pretty, its demographic situation is one of Latin America's best. A low population growth rate combined with abundant natural resources adds up to almost everyone at least eating well. Argentina's 1980 census-year population count was 27.9 million people, an increase of 17 percent from the 232.8 million people counted in 1970. The average annual rate of increase was 1.5 percent a year. With the exception of Uruguay, this was the lowest rate of increase in continental Latin America.

Slow growth is also in Argentina's future. Argentina's 1986 population of 30.5 million is projected to rise to 32.8 million by 1990 and 37.2 million by the year 2000. The Argentinean government is not pleased with these prospects, however, believing that a larger population is necessary to develop natural resources and a domestic market.

> ***Although Argentina's economic picture is not pretty, its demographic situation is one of Latin America's best.***

OLD FOR LATIN AMERICA, YOUNG FOR ULTIMATE CONSUMER COUNTRIES

Argentina's population is relatively old by Latin American standards, but is fairly young for an Ultimate Consumer country. Only 30 percent of Argentinians are under age 15, for example, as compared with 45 percent of Mexicans. Its median age of 27.4 years is not much younger than the median age of 30 in the U.S. Argentina's median age of 27.4 years in 1980 is projected to rise to 27.5 in the year 2000 and to 31.2 in 2020.

In 1980, 30 percent of the Argentinean population was aged 15 or under, 58 percent was aged 15 to 59, and 12 percent was over 60. As are many populations in the Ultimate Consumer countries, Argentina's population is aging. However, it is doing so at a much

*See the May 1984 issue of **International Demographics** for in-depth consumer information about Argentina. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

slower rate. By the year 2000, 13.2 percent of the population will be over 60 and by 2020 this proportion will rise to 14.7 percent of the total population.

TYPICAL NUCLEAR FAMILY DOMINATES

The 1980 census recorded 7.1 million Argentine households. The average number of persons per household was 3.9, compared to 2.7 in the U.S. Eleven percent of households had only one person, and 19 percent had two people, in contrast to 23 percent and 32 percent, respectively, in the U.S. Eighteen percent of households have 6 or more members, as opposed to only 5 percent of households in the U.S.

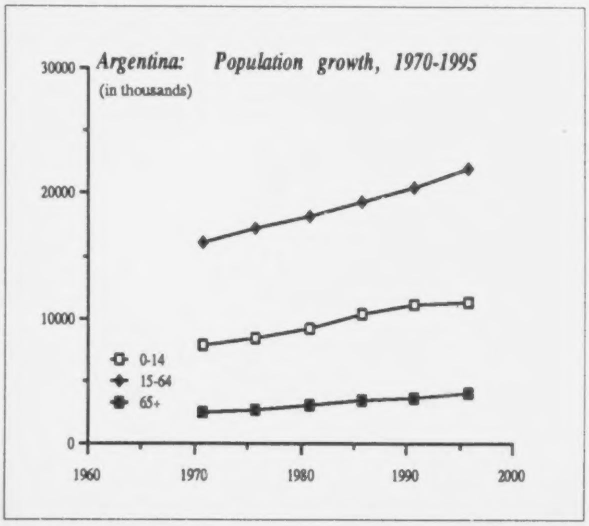
The majority of Argentine households in 1980 consisted of a married couple and children--2.9 million households. In 1980, 59 percent of all households had at least one parent with children and 24 percent were extended families, with relatives other than the parents and children also living under the same roof. Only 20 percent of households had no children.

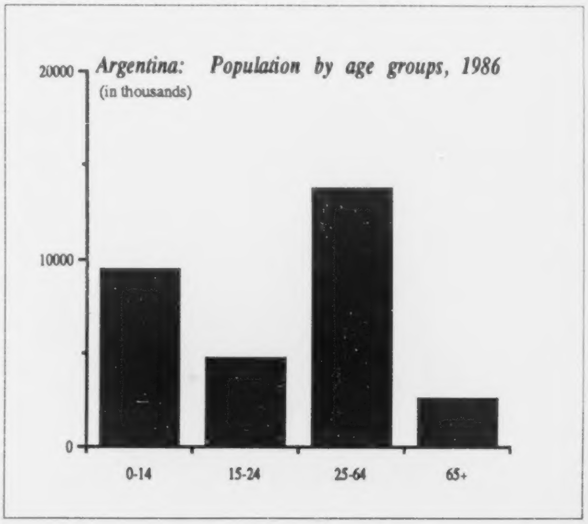
WOMEN KEEP UP WITH MEN IN EDUCATION

Argentina's high literacy rate, at over 90 percent, is one of Latin America's highest. And educational attainment is shared about equally between the sexes. Enrollment rates for males and females are almost identical in every age category.

Among children aged 5 to 9, 85 percent of both boys and girls in 1980 were enrolled in school. At 10 to 14 years of age, 88 percent of girls and 90 percent of boys were enrolled. About 40 percent of both boys and girls aged 15 to 19 were in school in 1980. Equality did not falter at the higher levels, either. About half of all students in higher education in 1980 were women.

Young women are slightly more likely than young men to complete advanced courses of study, however. Eighteen percent of women and 14 percent of men aged 20 to 24 had done so in 1980. Among persons aged 25 to 29 in 1980, 7 percent of women and 5 percent of men had a post-secondary degree.





take a quick look at Argentina

POPULATION

Total population (estimated 1986) | **30,750,929**
Rate of population growth (percent) | **1.3**
Lifetime births per woman (total fertility rate) | **2.94**
Birthrate (births per 1,000) | **21.30**
Death rate (deaths per 1,000) | **8.71**
Population under 15 (percent) | **30.2**
Population aged 65 plus (percent) | **8.7**
Median age | **27.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **46.8**
Number of persons per square kilometer | **11**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **70/66.8/73.5**
Infant mortality rate (number per 1,000 live births) | **34.4**
Population per physician/per nursing person | **640/610**
Daily calorie supply per capita (calories per person per day) | **3,159**

Education

Percent literate (male/female, total percentage) | **NA/NA, 82**
Number enrolled in secondary education as percentage of age group (male/female) | **54/63**
Number enrolled in higher education as percentage of population aged 20-24 | **25**

Labor force

Percent of labor force in agriculture/industry/services | **13/34/53**
Percentage of population of working age (aged 15-64) | **61**
Age-dependency ratio | **65.4**

STATUS OF WOMEN

Labor force participation rate (percent) | **27**
Number enrolled in secondary education as percentage of age group | **63**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **85/15**

Population of major metropolitan areas

city name | **Buenos Aires 9,927,404**

city name | **Rosario 954,608**

Average annual growth in cities of 20,000 or more (percent) | **2.0**

Average annual growth in rural areas (percent) | **-0.7**

Rate of total population growth (percent) | **1.3**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,230**

Australia

THE ULTIMATE CONSUMERS

Internal migration and immigration are critical factors in the continued population growth of Australia. While most Ultimate Consumer countries have growth rates of less than 1 percent, Australia's is at about 1.2 percent now and is expected to remain above 1 percent until the turn of the century. With a population density of only 2 persons per square kilometer, Australia has the room to grow. At the same time, it is economically stable enough to plan for future job creation and for the development of the infrastructure necessary to allow continued growth.

The fastest-growing populations live in the Northern Territory, Australian Capital Territory, Queensland, and Western Australia--in other words, the east and west coasts and at the seat of government.

While Australia has for many decades been an attractive destination for Europeans seeking new opportunities, it is now a land of opportunity for Asians. Between 1984 and 1985, immigration from China, Hong Kong, and India increased substantially. Asian immigrants accounted for nearly 46 percent of all settler arrivals in 1985.

Because Australia's immigrants are generally younger than its resident population, they contribute to a continued high birthrate. At 15.7 births per thousand, Australia has one of the highest birthrates among the Ultimate Consumer countries.

The marketing research and advertising industries are well-developed in Australia and supported by mapping and data companies that provide detailed information for marketing, direct mail, retailing, and consumer goods distribution.

AGE DISTRIBUTION

With a median age of 30 years, Australia is one of the youngest countries among the Ultimate Consumers. Nearly a quarter of its population is under age 15. The 15-to-24-year-old group accounts for nearly 17 percent of the population, a healthy pool from which to draw university students and labor force entrants. Thirty-five percent of its population is in the 29-to-44-year-old group, the primary group for settling in new households, buying furnishings, new homes, and other consumer goods.

> ***While Australia has for many decades been an attractive destination for Europeans seeking new opportunities, it is now a land of opportunity for Asians.***

Australians are concerned about the degree of youth joblessness in their country. About 85 percent of eligible boys and 88 percent of eligible girls are enrolled in secondary school. Now the schools focus primarily on college-oriented youth. Students who wish to learn a vocation have relied on an apprenticeship system. However, recently the apprenticeship system has fallen off and there is little to take its place. Recent reports have recommended that the high school curriculum

See the March 1983 issue of ***International Demographics*** *for in-depth consumer information about Australia. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

be broadened and that more opportunities be offered in vocational education, especially for young women.

As a result, there may be marketing opportunities for film strips, programmed learning materials, videotapes, and training films, as well as an interest in teacher-training for vocational education.

CONSUMPTION

Consumption in Australia is guided by several trends. A maturing population is one of them. Smaller households is another. As in some other developed countries, there is a growing concern over eating well and taking care of physical health. While consumer expenditures on food, rent, clothing and footwear, household appliances, and other household durables increased between 1980 and 1984, spending on alcoholic drinks and tobacco decreased.

Labor-saving devices are greatly in evidence. Ninety-eight percent of households own a refrigerator, 90 percent own a washing machine, 92 percent a vacuum cleaner. The majority of households have a telephone, a television, and radios are two and three to a household.

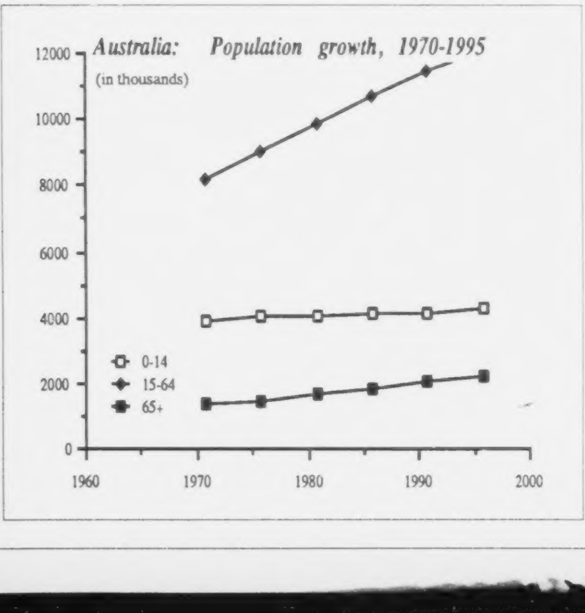
With an annual per capita GNP of $11,740, and 52 percent of its women in the labor force, Australia relies on many two-income households for a high standard of living. Workers in agriculture represent only 7 percent of the work force; services employ 61 percent of the work force.

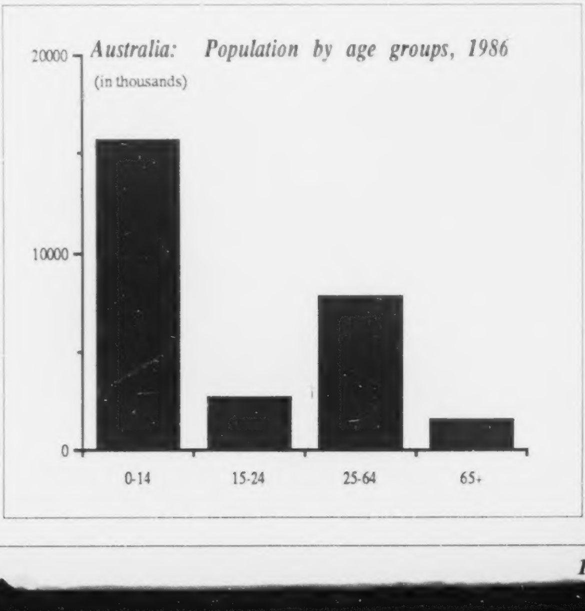
THE ACTIVE GRAYS

Despite Australia's extreme youth in comparison with many other Ultimate Consumers, its older population is an important influence on the marketplace. A quarter of all Australians are now age 50 and over, and one in eight is age 65 and older. Those age 50 and older spend more than $9 billion (Australian) annually on goods and services.

A 1985 Grey Growth Survey in Australia found that of those aged 50 to 64, more than 30 percent had incomes of at least $18,000 compared with the 1985 average household income of $20,500. However, only 4 percent of the retired over age 50 had incomes higher than $18,000.

Those in the 50-to-64-year-old group are more likely to purchase nonessential and luxury items than those in the 65 and older group because they are still in the workforce and are not worried about conserving their incomes.





take a quick look at Australia

POPULATION

Total population (estimated 1986) | **15,879,337**
Rate of population growth (percent) | **1.22**
Lifetime births per woman (total fertility rate) | **1.93**
Birthrate (births per 1,000) | **15.69**
Death rate (deaths per 1,000) | **7.45**
Population under 15 (percent) | **23.3**
Population aged 65 plus (percent) | **10.4**
Median age | **30.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **51.6**
Number of persons per square kilometer | **2**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **73/79**
Infant mortality rate (number per 1,000 live births) | **7.9**
Population per physician/per nursing person | **500/100**
Daily calorie supply per capita (calories per person per day) | **3,068**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **85/88**
Number enrolled in higher education as percentage of population aged 20-24 | **26**

Labor force

Percent of labor force in agriculture/industry/services | **7/32/61**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **51.3**

STATUS OF WOMEN

Labor force participation rate (percent) | **52**
Number enrolled in secondary education as percentage of age group | **88**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **87/13**
Population of major metropolitan areas
city name | **NA**
Average annual growth in cities of 20,000 or more (percent) | **1.4**
Average annual growth in rural areas (percent) | **0.5**
Rate of total population growth (percent) | **1.2**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$11,740**

Austria

THE ULTIMATE CONSUMERS

Austria is one of the few Western European countries that is not highly urbanized. In fact, only 56 percent of its population lives in urban areas. While this means that half the population can be reached by marketing in cities, the small size of the country, its national newspapers, and its accessible distribution systems mean that, in fact, most of the population is a likely target, whether in rural or urban areas.

BIRTHRATES ARE DOWN, BUT YOUTH HOLD THEIR OWN

While the birthrate in Austria has declined to 11.7 births per thousand, those aged 15 and under still make up nearly 18 percent of the population. Those aged 65 and over are about 14 percent of the population. The median age is 35.5 years. The total fertility rate (births per woman) is 1.48, well under the replacement level of 2.1, meaning that Austria's population is soon to follow the trend towards rapid aging set by most of the Western European countries. Austria's 1986 population of about 7.5 million people will remain relatively stable well into the 21st century.

As in Ireland, women are taking better advantage of opportunities in secondary education than men at the current time. While 71 percent of eligible young men are enrolled in secondary education, 75 percent of young women of the same age group are enrolled. About 25 percent of the population aged 20 to 24 is enrolled in higher education.

WORKING WOMEN ARE IMPORTANT TREND

For a country that is still relatively rural, women are an important part of the labor force. Women make up forty-one percent of the labor force, according to the most recent data from the OECD. This compares with 31 percent being reported by the International Labor Office in 1984. Fifty-five percent of women work, one of the highest rates outside of the Scandinavian countries.

> ***...Austria's population is soon to follow the trend towards rapid aging set by most of the Western European countries.***

Austria has a well-educated and well-trained labor force and the involvement of women in secondary education contributes to it. In 1986, the OECD reported that 8.5 percent of its labor force worked in agriculture, 37 percent in industry, and 54 percent in services. The rural areas provide winter and summer jobs in mountain and ski resorts and many women work in family-owned businesses.

Austria's workforce has weathered recessions fairly well and the unemployment rate has hovered around the 4 percent mark while some larger Europeans nations have faced rates as high as 10 to 13 percent. It has successfully used foreign workers when they

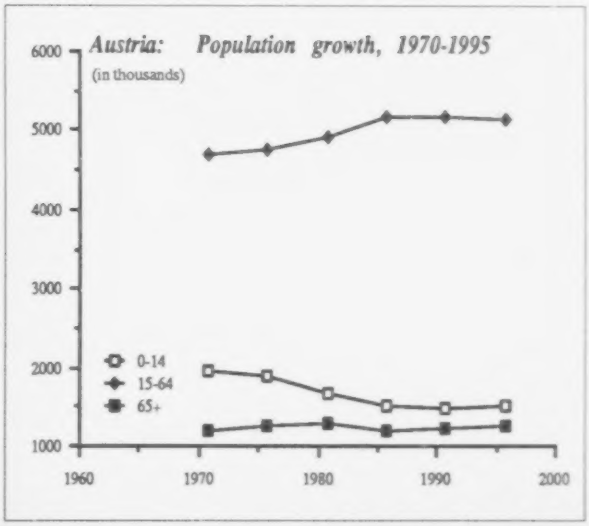
*See the July 1985 issue of **International Demographics** for in-depth consumer information about Austria. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

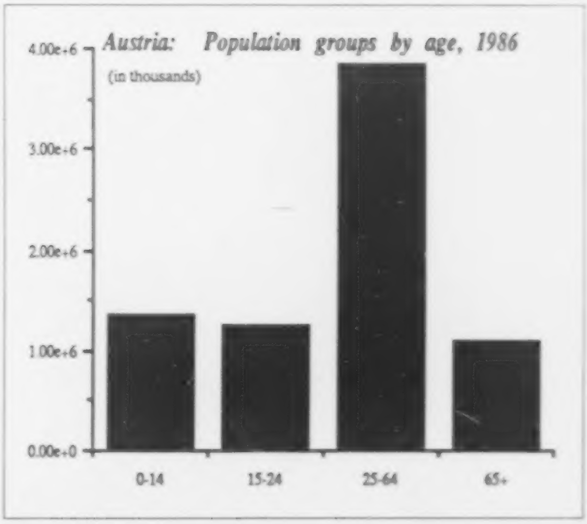
are needed to fill jobs, but has limited their entry during times of economic slowdown.

While its economy has been relatively stable, Austrians still have a modest standard of living. The per capita GNP is estimated at $9,140, the same range as the United Kingdom. Indeed, Austrians own passenger cars in relatively the same proportion as people in Belgium, The Netherlands, and Norway--at one car to approximately every three people.

HOUSEHOLD GROWTH CONTINUES

As in most industrialized nations, the number of households in Austria continues to grow, while the size of individual households is on the decline. Even though Austrians place a high value on children and family life, the divorce rate has continued to rise. Divorces peaked in 1982, however, and have dropped off slightly since then.





take a quick look at Austria

POPULATION

Total population (estimated 1986) | **7,562,601**
Rate of population growth (percent) | **0.08**
Lifetime births per woman (total fertility rate) | **1.48**
Birthrate (births per 1,000) | **11.70**
Death rate (deaths per 1,000) | **11.73**
Population under 15 (percent) | **17.9**
Population aged 65 plus (percent) | **14.4**
Median age | **35.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.5**
Number of persons per square kilometer | **89**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/79**
Infant mortality rate (number per 1,000 live births) | **9.3**
Population per physician/per nursing person | **580/170**
Daily calorie supply per capita (calories per person per day) | **3,479**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **71/75**
Number enrolled in higher education as percentage of population aged 20-24 | **25**

Labor force

Percent of labor force in agriculture/industry/services | **9/41/50**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **48.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **50.8**
Number enrolled in secondary education as percentage of age group | **75**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **56/44**

Population of major metropolitan areas

city name | **Vienna 1,531,346**

city name | **Graz 243,166**

Average annual growth in cities of 20,000 or more (percent) | **0.5**

Average annual growth in rural areas (percent) | **-0.7**

Rate of total population growth (percent) | **0.08**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$9,140**

Belgium

THE ULTIMATE CONSUMERS

Unlike her tiny neighbor, Luxembourg, Belgium struggles like much of the rest of Europe with high unemployment rates as the industrial-based economy shifts to one based on services. Belgium is the middle sister of Benelux--with 10 million people compared to fewer than a half million in Luxembourg, and 14 million in The Netherlands.

Belgium provides a concentrated market. Its 9.9 million people are squeezed into only 30,518 square kilometers for the highest density in Europe, outside of The Netherlands--323 people per square kilometer. There are three cities with populations of more than 200,000--Ghent, Charleroi, and Liege.

All this should make Belgium an interesting market, but there is one big problem--language. The Belgians are officially bilingual--French and Flemish--and products and services need to be advertised and labelled in both languages. While that might seem straightforward--especially if a firm does business in The Netherlands and France as well--it isn't as simple as it sounds. Belgium is its own market, and simply translating advertising messages from the Dutch or the French campaigns will not do. Agencies that work in Belgium suggest that the problems aren't insurmountable, but that time and budgets both have to increase to cope with them.

While the language problems are difficult, the concentration of 10 million people is attractive. A liberal government policy gives Belgium the world's largest cable network with 70 percent of the 3.6 million households with television access to about two dozen channels in six languages including English.

CENTER OF ECONOMIC POWER IS SHIFTING

Belgium's urban character isn't about to change. But the economic center of the country is shifting and with it, the population concentration. In the southern part of the country, Wallonia (the French-speaking sector) has dominated the economy for more than a century with its strong coal mining and steelmaking industries. But other forms of energy, cheaper iron and steel imports from Japan and South Korea, and a slowdown in government subsidies have helped to cause unemployment in such cities as Charleroi. High-tech and nontraditional industries have sprouted in Flanders in the north, shifting the center of political and economic power to the Dutch-speaking area. Antwerp, the leading port city, is also in the north, adding to the strength of that area.

> ***Women play an important role in the labor force in Belgium. About 39 percent of the labor force are female and almost 50 percent of women work, similar to the figures in other well-developed countries.***

Along with the shift to the north has come a shift to services. Two-thirds of the labor

See the September 1986 issue of ***International Demographics*** *for in-depth consumer information about Belgium. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

force--about 2.4 million people--are employed in the services sector. The growth of that sector has stabilized in the past three years, but its growth throughout the 1970s was spectacular. In 1970, only 2 million people worked in services. Only about 3 percent of the population work in agriculture, leaving 31 percent employed in industry.

Women play an important role in the labor force in Belgium. About 39 percent of the labor force are female and almost 50 percent of women work, similar to the figures in other well-developed countries. The female percentage of the labor force is expected to continue its increase as the number of young women declines. The government has also raised the official retirement age for women from age 60 to 65.

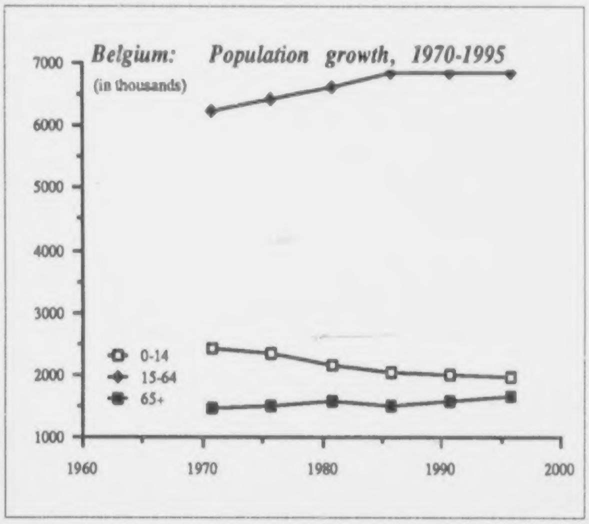
FOOD CONSUMPTION LEADS EXPENDITURES

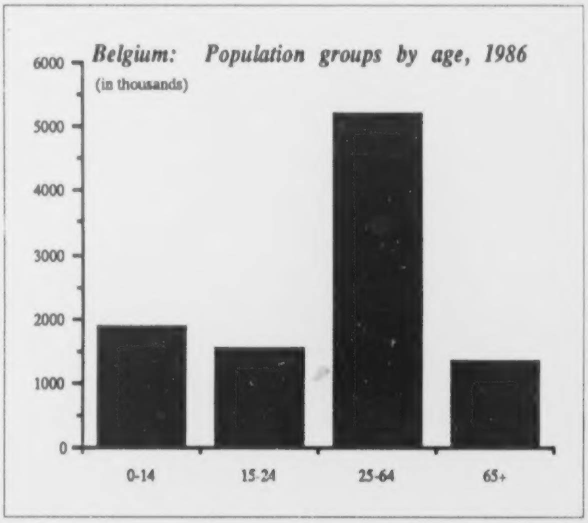
In most developed countries, one of three categories--food, housing, or transportation--leads expenditures. In Belgium, the leading expenditure is food. One reason is that Belgium's small agricultural base means it must import many foods from other European Community members. Food takes 18.6 percent of the family budget, followed by rent, heating, and light at 17.7 percent. Other large expenditures are for furniture and furnishings at 12.2 percent, and transportation and communication at 12.7 percent. Together beer and wine account for 63 percent of total consumer expenditures in the beverage category. Mineral water and carbonated soft drinks account for only about 22 percent.

While some spending has shifted as the age structure has changed in Belgium, overall the share of expenditures in various categories has remained remarkably stable. Thus, it is possible to look at distribution figures even from the late 1970s or early 1980s to get some indication of how Belgians spend their money. Even in the area of health care--where expenditures have soared in some countries--there has been little change. In 1979, Belgians spent 9 percent of their consumer dollars on health care. In 1983, they spent 9.2 percent of budgets on health care.

HOUSEHOLDS ARE SHRINKING

While the share of budgets that are spent in certain categories has remained relatively constant, household size is declining in Belgium because the population is aging, divorce has taken its toll, and families are having fewer children. The largest households are found in the northeast and in central Flanders, the core of the Ardennes, and the southern part of German-speaking Wallonia. In other communities--the suburbs of Ghent and Antwerp, southern Louvain and northern Namur, larger household sizes are attributed to the high proportion of young married couples. Singles account for 25 percent of the Belgian population.





take a quick look at Belgium

POPULATION

Total population (estimated 1986) | **9,865,969**
Rate of population growth (percent) | **0.07**
Lifetime births per woman (total fertility rate) | **1.56**
Birthrate (births per 1,000) | **11.98**
Death rate (deaths per 1,000) | **11.29**
Population under 15 (percent) | **18.6**
Population aged 65 plus (percent) | **13.9**
Median age | **35.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.7**
Number of persons per square kilometer | **324**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **72/79**
Infant mortality rate (number per 1,000 live births) | **8.7**
Population per physician/per nursing person | **380/130**
Daily calorie supply per capita (calories per person per day) | **3,705**

Education

Percent literate (male/female, total percentage) | **97/97, 97**
Number enrolled in secondary education as percentage of age group (male/female) | **90/91**
Number enrolled in higher education as percentage of population aged 20-24 | **28**

Labor force

Percent of labor force in agriculture/industry/services | **3/31/66**
Percentage of population of working age (aged 15-64) | **67**
Age-dependency ratio | **47.0**

STATUS OF WOMEN

Labor force participation rate (percent) | **48.7**
Number enrolled in secondary education as percentage of age group | **91**
Percent of women aged 15-49 using contraceptives | **85**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **89/11**
Population of major metropolitan areas
    city name | **Brussels 982,434**
    city name | **Antwerp 488,425**
Average annual growth in cities of 20,000 or more (percent) | **0.1**
Average annual growth in rural areas (percent) | **-0.6**
Rate of total population growth (percent) | **0.07**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$8,610**

Canada

THE ULTIMATE CONSUMERS

With 25 million people spread over a land area of nearly 10 million square kilometers, Canada has only 3 people per square kilometer. Among Ultimate Consumer countries, only Australia has a lower population density. But, because the population is concentrated on the east and west coasts, marketers can reach more than 60 percent of Canadian population just by looking at the provinces of Quebec and Ontario--both on the East Coast. Add Alberta and British Columbia, and 82 percent of the population is covered.

A MINIATURE EUROPE

One of the ways Canada differs from other North American countries is that it has two official languages. Quebec is a French-speaking province, and indeed, the national government functions in two languages. In Quebec only about 13 percent of the population claims English as its mother tongue, while 83 percent claims French, and 5 percent claim some other language. In the other provinces and territories, the reverse is true. About 88 percent of the population claims English as its native language, only 4 percent claim French, and about 8 percent claim another language. Marketers must view Quebec as a separate market for product development and advertising messages.

THE CANADIAN BABY BOOM

The post-war baby boom has a substantial effect on Canada, but the age structure is also affected by immigration. Immigrants to Canada are younger, on the average, than natives. The effect is to keep the median age of Canadians about one year younger than U.S. residents. While Canada's policymakers worry about how they will provide health care to the elderly in the 21st century, they still have about 22 percent of the population under age 15. Only about 10 percent of the population is aged 65 and over, much lower than in many Ultimate Consumer countries. Because of international migration and the baby boom, primary growth is occurring among the age groups in which people are marrying, having families, and pursuing their careers.

> ***Because of its age and geography, Canada appears to be a good market for leisure-time and outdoor items.***

Montreal and Toronto, Canada's two largest cities, show great prosperity. Even though they are different markets because of the language differences they share certain similarities. Gentrification is apparent in older areas in the city as young professional singles and couples move back to the cities and revitalize them. Some of these people will no doubt remain in the city when they begin having children, but others will migrate toward the suburbs. Thus, the suburbs can expect to continue to be the scene of growth--particularly in household services and furnish-

*See the June 1982 issue of **International Demographics** for in-depth consumer information about Canada. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

ings as well as in items and activities for children and youth.

USE OF TIME

Because of its age and geography, Canada appears to be a good market for leisure-time and outdoor items. It is quite apparent who the most active people are by looking at time-use studies. Overall, for example, Canadians spend less time watching television than people in either the United States or Japan. Overall the Japanese spend about 24 hours a week and U. S. residents spend about 17 hours a week watching television. In Canada, the average is only 13 hours a week and that is dramatically affected by the 17 and 20 hours that 55-to-64 year olds and those aged 65 and over spend, respectively. The average 25-to-44-year-old spends only about 12 hours a week viewing television.

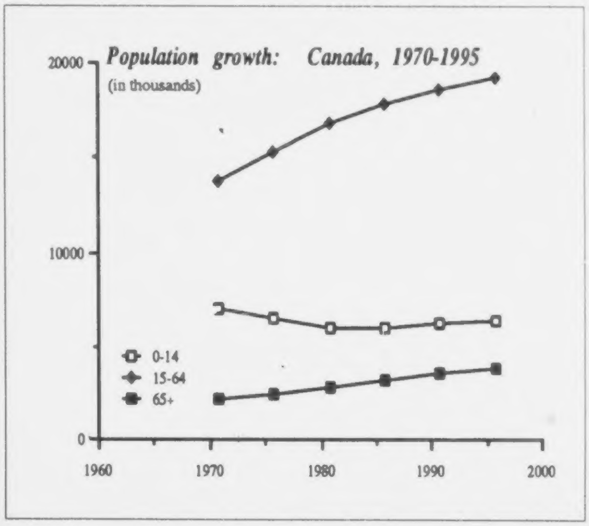
Not surprisingly, single people spend more time with their TV set than do couples with children, and employed women spend the least time of any group. Employed women spend only about 9 hours a week on TV; homemakers, 14 hours a week; and other women, 15 hours a week. Thus, television advertising time in Canada must be chosen carefully if the target is the employed female. Print and poster media may be more appropriate, especially when commuter patterns are considered.

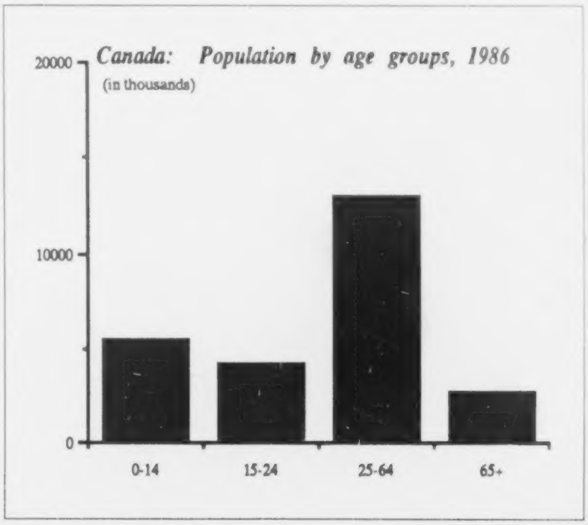
PROVINCIAL DIFFERENCES

There are substantial differences among lifestyles in Canada, depending on the province. For example, on Prince Edward Island, in Nova Scotia, and New Brunswick, the primary method of heating homes is oil or other liquid fuels, whereas in Manitoba, Saskatchewan, and Alberta, homes are more likely to be heated with piped gas.

In Ontario, Manitoba, Alberta, and British Columbia, more than a quarter of households do not have an electric washing machine. In Alberta, about 50 percent of households own an automatic dishwasher, whereas in Quebec and Ontario, only about a third of households have this appliance. Ownership of microwave ovens in Canada increased from only 10 percent of households in 1982 to 16 percent of households in 1984, but in Saskatchewan and Alberta, more than a quarter of households have a microwave.

Because of the provincial differences, marketers in Canada must make choices. On the question of microwaves, for example. Sales of microwave food products and accessories might be higher in Saskatchewan and Alberta because the percentage of households owning microwaves is much higher than in other provinces. However, because the numbers of households are so much smaller, the potential may be less in the long term. Nearly 33 percent of households in Alberta own a microwave, but that amounts to only about 271,000 households, whereas in Quebec where only 8.2 percent of households own a microwave, 499,000 households are involved.





take a quick look at Canada

POPULATION

Total population (estimated 1986) | **25,622,726**
Rate of population growth (percent) | **0.93**
Lifetime births per woman (total fertility rate) | **1.68**
Birthrate (births per 1,000) | **14.85**
Death rate (deaths per 1,000) | **7.13**
Population under 15 (percent) | **21.3**
Population aged 65 plus (percent) | **10.6**
Median age | **31.4**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **53.2**
Number of persons per square kilometer | **3**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **77/73/81**
Infant mortality rate (number per 1,000 live births) | **7.6**
Population per physician/per nursing person | **510/120**
Daily calorie supply per capita (calories per person per day) | **3,459**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **92/93**
Number enrolled in higher education as percentage of population aged 20-24 | **46.9**

Labor force

Percent of labor force in agriculture/industry/services | **5/26/69**
Percentage of population of working age (aged 15-64) | **69**
Age-dependency ratio | **47.3**

STATUS OF WOMEN

Labor force participation rate (percent) | **61.2**
Number enrolled in secondary education as percentage of age group | **93**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **76/24**
Population of major metropolitan areas
    city name | **Toronto 600,000**
    city name | **Montreal 1,000,000**
Average annual growth in cities of 20,000 or more (percent) | **1.1**
Average annual growth in rural areas (percent) | **0.9**
Rate of total population growth (percent) | **0.9**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$13,280**

Chile

THE ULTIMATE CONSUMERS

Chile's future looked bright in the late 1970s. Per capita GNP of $800 in 1975 had risen steadily to $2160 in 1982. But 1982 was not a good year for Chile. In that year, Chile's debt drama began--a drama she has not yet played out fully.

Chile is one of Latin America's most heavily indebted countries. It owed $21 billion in 1985. Only Brazil ($107 billion), Mexico ($99 billion), Argentina ($50.8 billion), and Venezuela ($33 billion) owed more. Debt-service payments for 1985 to 1987 totaled $9.2 billion.

Chile's debt crisis has not been good for consumption. Between 1980 and 1984, per capita consumption dropped 2.1 percent annually. Investment too was way down, falling 11 percent a year during the same period. And imports decreased by 4.2 percent, while exports rose only 0.7 percent a year. GDP too fell by 1.4 percent a year.

HYPERURBANIZED

Chile's economic downturn combined with overconcentration of its population in Santiago--Chile's largest city--has aggravated the country's problems. For Chile, the distribution of the population is more of a problem than the growth of the population. Chile, like Argentina, grew slowly at an average annual rate of 1.7 percent during the period 1965 to 1985. This compares to Argentina's 1.5 percent annual growth, Mexico's 2.9 percent annual growth, and Brazil's 2.4 percent annual growth.

But about 80 percent of Chileans now live in cities, up from 45 percent in 1950. Such rapid urban growth with extreme concentration of a country's wealth and population in a single city leads to strains on urban services, slum housing, and unemployment or underemployment as workers find limited access to formal-sector jobs.

Santiago is a prime example of Latin America's propensity for creating megacities. Santiago is now home to one out of every three Chileans. In 1980, 36.4 percent of Chile's population resided there. This compares to Buenos Aires' 35.2 percent share of Argentina's population, Lima-Callao's 26.6 percent of Peru's population, and Caracas' 19.6 percent of Venezuela's population. Santiago is Chile's only city with over 1 million people. The 1980 population was about 4 million people.

> ***For Chile, the distribution of the population is more of a problem than the growth of the population.***

Other important urban centers include Valparaiso (266,577 people), Concepcion (206,107), and Vina del Mar Valparaiso (290,014).

Chile's 1982 census counted 11.2 million people, up from 8.8 million in 1970.

CHILE'S POPULATION IS GROWING SLOWLY

Chile, like Argentina, Cuba, and Uruguay, experienced early and gradual declines in birth and death rates beginning in the 1950s and 1960s, resulting in low rates of population increase from the early 1970s to the present. This trend will continue with the growth rate slowing further from its current 1.68 percent to an estimated 1.41 percent in 1990 and 1.15 in the year 2000. Chile's 1986 population of 12.2 million will increase to 13 million by 1990 and about 15 million by the year 2000.

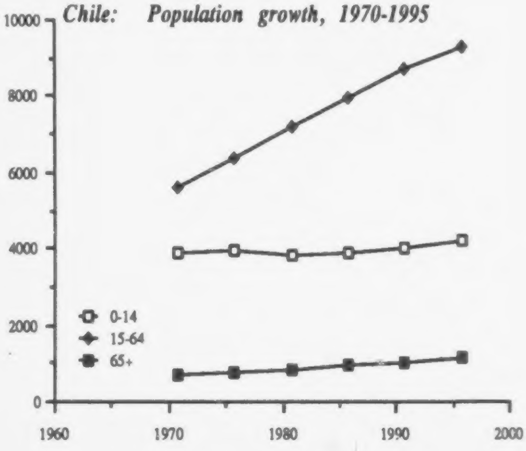
In the 1950s, Chilean women commonly bore five children. However during the late 1960s, the fertility rate began its steady decline from about four children per woman to 2.6 children per woman in the early 1980s. Chilean women now have on average fewer children than their Latin American counterparts. In all of Latin America, only Cuban women have fewer children, averaging two lifetime births.

PROPORTION OF YOUTH DECLINING

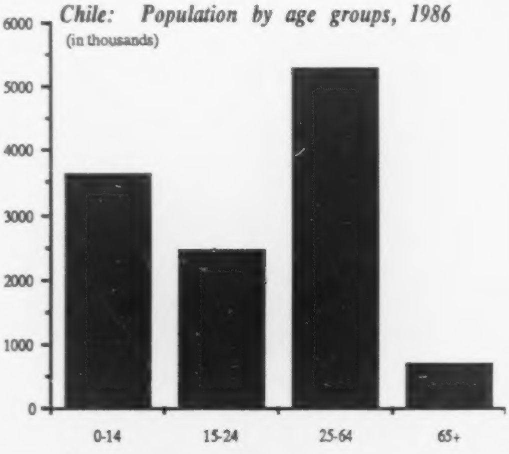
In 1960, about 40 percent of Chileans were under age 15. However, falling birthrates reduced this proportion substantially. Chile now has a moderately young population with about 30.8 percent of its population under age 15. This trend is expected to continue with only 28 percent of the population aged under 15 by the year 2000.

At the other end, Chile will begin to gray slowly. The 63 percent of the total population between the ages of 15 and 64 will remain fairly stable, increasing to 65 percent by the year 2000, but the 5.7 percent of the total population aged over 65 will increase to 6.7 percent by the year 2000 and to 9.7 percent in 2020.

In 1980, 51.7 percent of all women fell between the ages of 15 and 49. This proportion is expected to remain constant, rising slightly to 52.5 percent of all women in 1990 and decreasing to 52. 4 percent in the year 2000.



Chile: Population growth, 1970-1995



Chile: Population by age groups, 1986

(in thousands)

take a quick look at Chile

POPULATION

Total population (estimated 1986) | **12,257,806**
Rate of population growth (percent) | **1.55**
Lifetime births per woman (total fertility rate) | **2.53**
Birthrate (births per 1,000) | **21.92**
Death rate (deaths per 1,000) | **6.41**
Population under 15 (percent) | **30.8**
Population aged 65 plus (percent) | **5.7**
Median age | **24.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **52.8**
Number of persons per square kilometer | **16**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/67/75**
Infant mortality rate (number per 1,000 live births) | **19.5**
Population per physician/per nursing person | **950/NA**
Daily calorie supply per capita (calories per person per day) | **2,574**

Education

Percent literate (male/female, total percentage) | **90/82, 86**
Number enrolled in secondary education as percentage of age group (male/female) | **53/62**
Number enrolled in higher education as percentage of population aged 20-24 | **11**

Labor force

Percent of labor force in agriculture/industry/services | **16/25/59**
Percentage of population of working age (aged 15-64) | **63**
Age-dependency ratio | **55.9**

STATUS OF WOMEN

Labor force participation rate (percent) | **22**
Number enrolled in secondary education as percentage of age group | **62**
Percent of women aged 15-49 using contraceptives | **43**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **80/20**
Population of major metropolitan areas
    city name | **Santiago 4,039,287**
    city name | **Valparaiso 266,577**
Average annual growth in cities of 20,000 or more (percent) | **2.2**
Average annual growth in rural areas (percent) | **-1.3**
Rate of total population growth (percent) | **1.5**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$400**

East Germany

THE ULTIMATE CONSUMERS

In 1975, East and West Germany had the dubious distinction of being two of the few countries in the world experiencing natural decrease in their populations. The number of deaths in the populations of both countries was greater than the number of births by 50,000 to 60,000.

But, a mere 10 years later, these two nations couldn't be farther apart. West Germany is still losing ground with a projected decline from its present 61 million to 58 million by the year 2000, while East Germany has reversed its falling birthrate, increasing its annual number of births by one-third from 180,000 per year to 240,000 a year.

Why such a stunning reversal? In 1976, spurred by the vision of a country populated by old people and a declining population, the East German government implemented family policies to encourage births. This attempt to moderate the expected outcome of increasing proportions of old people in the total population has so far paid off. The average number of lifetime births per woman is expected to continue to rise from its present 1.7 children per woman to 1.9 children per woman by the year 2000. This level is close to the 2.1 children per couple needed in order for a population to just reproduce itself.

East Germany's estimated 1986 population of 16.6 million people will therefore remain relatively stable, decreasing only slightly to 16.5 million in the year 2000. Soon after the turn of the century, the growth rate will go from negative to positive--although at .03 percent, growth will be negligible.

MAKING MOTHERHOOD ATTRACTIVE

The question remains as to whether East Germany's experiment can be transferred to the countries of the rapidly aging industrialized world such as Japan, most of Western Europe, and the U.S. The 1976 measures taken by East Germany not only cost dearly, but gave mothers-to-be advantages most Western countries could not offer.

> ***In 1976, spurred by the vision of a country populated by old people and a declining population, the East German government implemented family policies to encourage births.***

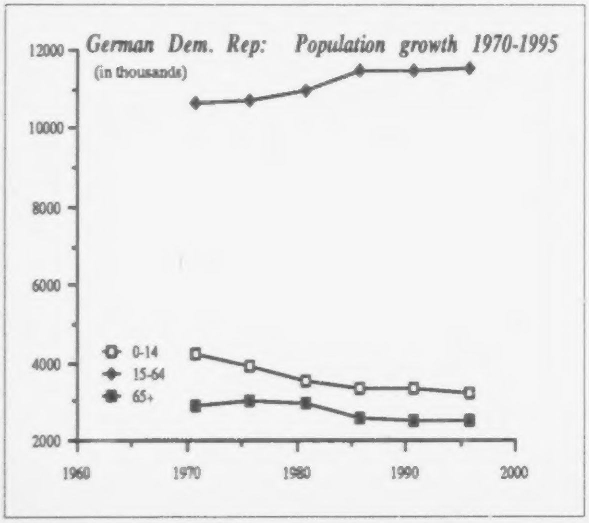
Incentives to give birth included parental leave for one year at 70 percent to 80 percent of salary, giving mothers one month's additional salary and an additional day's leave per month for each additional birth, a 40-hour work week instead of the regular 43 hours, priority allocation of housing based on the number of children in the household, and access to loans at marriage and at each birth to pay for household necessities. A big bonus was job security of the most supportive kind--no woman with a child under three can be fired from her job. Such incentives came on top of the standing availability of contraception and voluntary terminations of pregnancy.

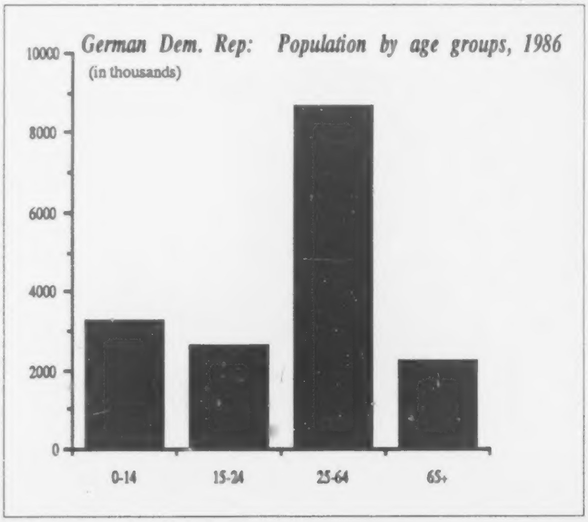
HEADING OFF OLD AGE

Increasing the birthrate was just what East Germany needed to stall population aging. In 1970, 15.5 percent of the population was 65 or over. By 1985, this proportion had dropped to 14 percent of the population. This proportion is expected to drop further to about 13.7 percent of the population in 1995, rising again to 14.6 percent by the year 2000. The proportion of those under age 15 will continue decreasing, however, from 18.5 percent of the total population in 1985 to about 17.4 percent of the population in the year 2000. The slack is expected to be taken up by those of working age (15 to 64 years). The proportion of those of working age is to increase from 67.5 percent of the total population in 1985 to 68 percent in the year 2000.

EAST GERMAN PER CAPITA GNP BEATS OUT ALL OTHERS IN SOVIET BLOC

Although GNP per capita dollar figures are difficult to come by for centrally planned economies, The World Bank recently released figures estimating GNP per capita for 1980 for eight Soviet Bloc countries. Not surprisingly, East Germany came out on top with per capita GNP of $5,910 in 1980--52 percent of U.S. per capita GNP for the same year, followed by Czechoslovakia, $4,740; Hungary, $4,390; USSR, $4,190; Poland, $3,730; Bulgaria, $3551; Romania, $2,680; and Yugoslavia, $2,620. East Germany's official GNP growth rate was 3.9 percent annually between 1977 and 1980, although The World Bank estimate counting hidden inflation is closer to 1 percent annually during the same period.





take a quick look at German Democratic Republic

POPULATION

Total population (estimated 1986) | **16,627,546**
Rate of population growth (percent) | **-0.12**
Lifetime births per woman (total fertility rate) | **1.75**
Birthrate (births per 1,000) | **13.60**
Death rate (deaths per 1,000) | **13.41**
Population under 15 (percent) | **19.2**
Population aged 65 plus (percent) | **13.5**
Median age | **35.2**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.7**
Number of persons per square kilometer | **154**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **69/75**
Infant mortality rate (number per 1,000 live births) | **11.0**
Population per physician/per nursing person | **490/NA**
Daily calorie supply per capita (calories per person per day) | **3,718**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **92/87**
Number enrolled in higher education as percentage of population aged 20-24 | **30**

Labor force

Percent of labor force in agriculture/industry/services | **11/50/39**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **48.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **57**
Number enrolled in secondary education as percentage of age group | **87**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **78/22**

Population of major metropolitan areas

city name | **East Berlin 1,173,000**

city name | **Leipzig 557,900**

Average annual growth in cities of 20,000 or more (percent) | **0.3**

Average annual growth in rural areas (percent) | **-1.5**

Rate of total population growth (percent) | **-0.12**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$5,910**

Finland

THE ULTIMATE CONSUMERS

Doing business in Helsinki, the capital of Finland, requires advertising and labelling in Finnish. Right? Only partially. While the majority in Helsinki use Finnish, nearly 9 percent of the population are Swedish and the city has two official languages. Some cities in the same province as Helsinki have two official languages with Swedish-speaking majorities. Of the 4.9 million people who live in Finland, about 6 percent are Swedish-speaking, but in a few communities up to 90 percent of the population is Swedish speaking.

RURAL/URBAN SPLIT

People who live in the urban communities are more likely to be in smaller households, to be working, and to have a better education than those living in rural communities. Finland has a low population density, but 2.9 million of its residents live in urban communities, where the density is 82.6 people per square kilometer compared with only 7.3 per square kilometer in the rural communities where the other nearly 2 million people live. The urban/rural differences in Finland are important in some cases and the small rural communities play an important role in the lifestyle of the country.

While the urban communities have 59 percent of the population, they have nearly 64 percent of all households. In the urban areas, household size is about 2.4 persons. In the rural areas, it is about 2.9 persons. Nearly 48 percent of the population is economically active in the urban areas. In the rural areas, only 44 percent is economically active.

Urban communities claim only 59 percent of the population, but they claim 76 percent of the population that has attained the third level of education, and 62 percent of the population that has completed the second level of education.

> ***People who live in the urban communities are more likely to be in smaller households, to be working, and to have a better education than those living in rural communities.***

YOUTH PLAYS A ROLE

For a country with a relatively high median age--34.9 years--nearly a fifth of the Finnish population is still under age 15. Again, there are urban/rural age differences, but they are not too dramatic. In urban communities, 19 percent of the population is aged 15 and under; in rural communities it is fully 20 percent. Nearly 70 percent of the population in urban areas is of working age, while 11.7 percent is aged 65 and older. In rural communities, only 66 percent are in the working ages of 15 to 64, and 13.3 percent are age 65 and older.

In all of Finland, in 1984, there were 669,560 families with children under age 18.

See the February 1983 issue of ***International Demographics*** *for in-depth consumer information about Finland. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

Of those, 85 percent were married couples with children. This figure includes cohabitees with children. Thirteen percent of the families were mothers alone with children, and less than 2 percent were fathers alone with children. These figures are similar to those in other developed countries. Married couples with children have the highest number of children--an average of 1.7 per family in urban areas and 1.9 per family in rural areas, while fathers alone with children have the least--an average of 1.3 in both rural and urban municipalities.

Age-specific fertility rates in Finland confirm that women are waiting longer to have children. The birthrate for 20-to-24-year-olds in 1975 in Finland was 105.5 per 1,000 women. By 1984, it had dropped to 82 births per 1,000 women. For women aged 30 to 34, however, the birthrate has risen from 59.6 in 1975 to 78.3 in 1984. The rate is even rising slightly for older women. In 1975 women aged 40 to 44 had 5.9 births per thousand. By 1984, that rate had risen to 7.0 births.

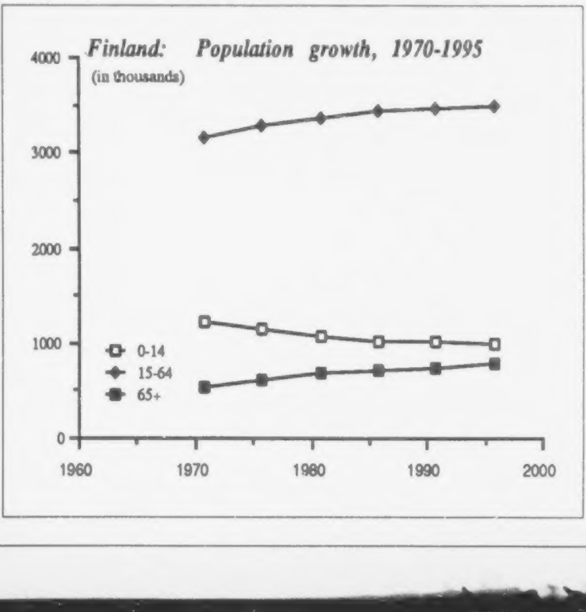
THE STATUS OF WOMEN

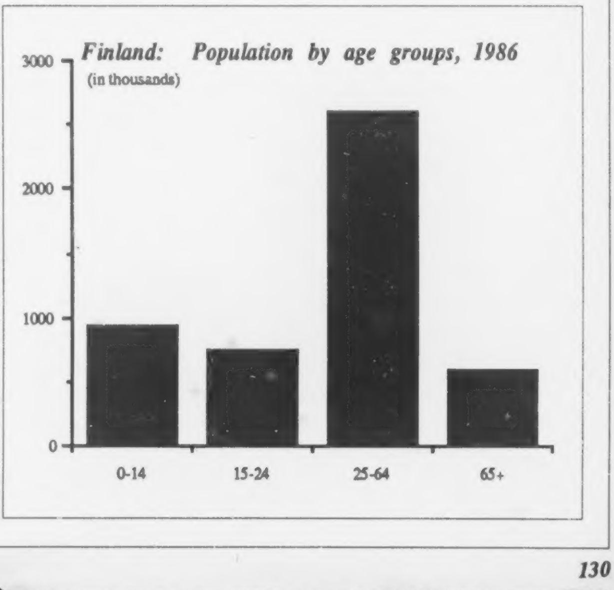
Nearly 21 percent of Finnish women have completed a third level of education--the equivalent of college in the U. S. . This is a slightly higher proportion than the population as a whole. Whereas only 14 percent of women aged 65 and older ever completed their education, 80 percent of 20 to 24 year-old women have done so. Of those, 92 percent completed the second level--high school--and 8 percent have completed college. Among 25-to-29-year-olds, 75 percent completed the second level and a quarter completed college. Thus, Finnish women are taking advantage of higher education in much the same way that women in other developing countries are.

Not surprisingly, given their high educational levels, Finnish women have the highest labor force participation rate in the world--nearly 73 percent of them work outside the home. Labor-saving devices are much in evidence in the country. Microwave ovens, which have not penetrated the European market the way they have the U. S. market, are in 3 percent of the households in Finland. The only country in Europe that has a higher ownership rate is the United Kingdom at 14 percent. Austria and West Germany match Finland with its 3 percent penetration, but indications are that the sale of labor-saving devices could be a growth area in Finland.

LEISURE IS A GROWTH INDUSTRY

One of the few categories of personal expenditure that is growing slightly in Finland is the area of recreation, entertainment, education, and cultural services. The Finns' high level of education, fairly stable economy, relatively high per capita GNP--$10,770--provide an environment in which people can spend time and money on their personal interests.





take a quick look at Finland

POPULATION

Total population (estimated 1986) | **4,926,082**
Rate of population growth (percent) | **0.42**
Lifetime births per woman (total fertility rate) | **1.69**
Birthrate (births per 1,000) | **13.02**
Death rate (deaths per 1,000) | **9.54**
Population under 15 (percent) | **19.3**
Population aged 65 plus (percent) | **12.7**
Median age | **34.9**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.5**
Number of persons per square kilometer | **14**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/79**
Infant mortality rate (number per 1,000 live births) | **6.5**
Population per physician/per nursing person | **460/100**
Daily calorie supply per capita (calories per person per day) | **3,077**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **93/100**
Number enrolled in higher education as percentage of population aged 20-24 | **31**

Labor force

Percent of labor force in agriculture/industry/services | **12/35/53**
Percentage of population of working age (aged 15-64) | **67**
Age-dependency ratio | **45.6**

STATUS OF WOMEN

Labor force participation rate (percent) | **72.8**
Number enrolled in secondary education as percentage of age group | **100**
Percent of women aged 15-49 using contraceptives | **80**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **59/41**

Population of major metropolitan areas

city name | **Helsinki 484,480**

city name | **Tampere 167,732**

Average annual growth in cities of 20,000 or more (percent) | **1.8**

Average annual growth in rural areas (percent) | **-2.3**

Rate of total population growth (percent) | **0.4**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$10,770**

France

THE ULTIMATE CONSUMERS

Despite failing to reach De Gaulle's goal of 100 million people, France is expected to stay a bit younger than its aging European neighbors of West Germany, the Scandinavian countries, Britain, Italy, and Holland. In the last 25 years, the French population has grown steadily, from about 45.6 million in 1960 to 54.6 million in 1985.

Due to falling fertility rates, however, the French population is expected to grow at a much slower rate in the next 25 years. Projected population for the year 2010 is about 57.8 million. French fertility rates fell below replacement level in the early 1970s and have hovered around 1.8 children per woman since that period. Given present socioeconomic and cultural conditions, the fertility rate is not expected to rise above 1.9 children per woman until after 2020.

THE END OF LIVING UNDER ONE ROOF

Living under one roof is passé with the French. Going it alone is a lifestyle increasingly taken up by older French women either by choice (greater availability of housing) or by default (children unwilling to share their homes).

Because of population aging and the trend toward families no longer living under the same roof with its unattached or widowed members, the number of one-person households in France jumped from 2.8 million in 1962 to 4.8 million in 1982. The rate at which persons sharing a dwelling fell between 1962 and 1982 is roughly comparable to the rate at which single-person households formed. By 1982, one in every four French households was a one-person household. In two-thirds of these households, the one person was a woman.

Between 1962 and 1982, the number of households in France grew 10.4 percent--twice as rapidly as the population--with average household size dropping from 3.1 members in 1962 to 2.7 members in 1982.

> ***Large French families have almost disappeared, replaced instead by the typical nuclear family of a couple and two children.***

Although couples are being formed somewhat later than those in 1962, living as a couple is still the normal pattern for the vast majority of French from early adulthood on. Large families have almost disappeared, replaced instead by the typical nuclear family of a couple and two children.

Due to earlier retirement, the number of retired couples almost doubled between 1962 and 1982. At present, one in five couples is a retired couple. This trend is particularly important for marketers. Couples retired before the onset of old age present marketers with a new market segment. With time on their hands and the energy to enjoy it, young retirees enter a new stage of life with its own special demands for goods and services.

*See the September 1984 issue of **International Demographics** for in-depth consumer information about France. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

STATUS OF FRENCH WOMEN ON THE RISE

With younger people staying in school longer and older people retiring earlier, French women have gone to work in droves. Women now make up 41 percent of the French workforce, up from 35 percent of the workforce ince, up from 35 percent of the work force in 1962. About 9.6 million women are in the labor force.

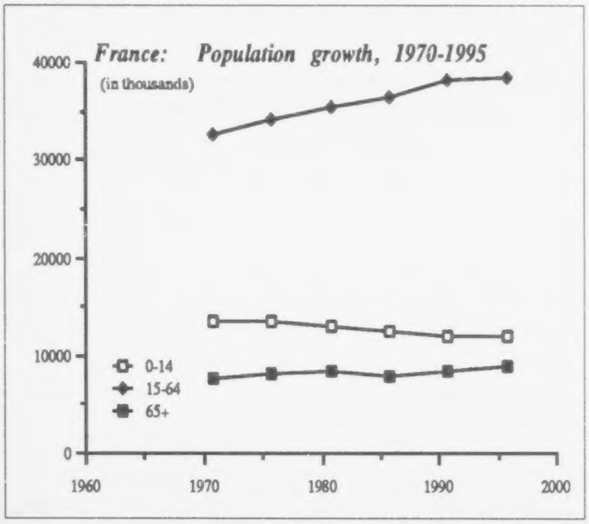
Once working, French women are more likely than their EC counterparts to stay that way after marriage. Usually EC women workers break for childrearing, with the employment activity rate for women in the 20-to-25 age group dropping steadily until the 30-to-35 age group is reached. After marriage, the activity rate among women in the Com-munity drops from an average of 48 percent to 42 percent, as compared to a rise in the French activity rate from 48 percent to 50 percent. About six out of ten women between the ages of 19 and 45 work.

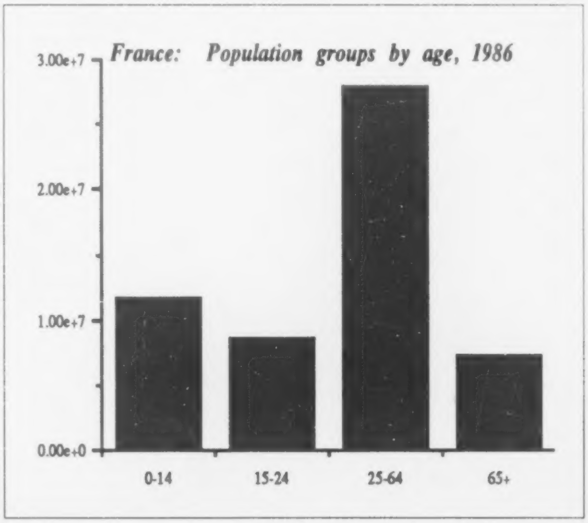
supportive of the liberated woman than other Europeans, according to a recent EC survey. Except for Danes and the Dutch, a greater percentage of the French expressed equal confidence in women carrying out traditional male activities such as doctoring and holding a government post than any other EC nationality. And 40 percent of the French polled felt that strict equality in the sharing of household duties was the best division of roles in the family. This percentage was bested only by Danes (46 percent) and Greeks (51 percent).

FRANCE'S NEW HIGH-TECH MENTALITY

Who would ever think that using your telephone was a revolutionary act? But, in France, where *Minitel* videotex terminals connect over a million French households to a nationwide electronic telephone directory, the communications revolution is just one call away. The *Minitel* video screens are linked to information banks, allowing users not only to call up telephone numbers but to read the morning newspaper and want ads, to bank, and to shop. With 1.4 million terminals in use in households across France, France's Teletel--the national videotex system operated by the state-owned monopoly *Postes Telephones* and Telecommunications (PTT)--is the world's first thriving mass-consumer videotex system.

France's love affair with the *Minitel* is forging a new French mentality. A recent study found that two-thirds of the French polled were enthusiastic about or interested in computers. Armchair banking and shopping through Minitel and smart cards is a national craze. Minitel's super-successful le Kiosque , which allows users to read news synopses, go through want ads, and communicate with each other, has been hailed as a friend to the lonely and decried as a vehicle for further isolation and alienation.





take a quick look at France

POPULATION

Total population (estimated 1986) | **55,387,361**
Rate of population growth (percent) | **0.38**
Lifetime births per woman (total fertility rate) | **1.82**
Birthrate (births per 1,000) | **13.86**
Death rate (deaths per 1,000) | **10.06**
Population under 15 (percent) | **21.0**
Population aged 65 plus (percent) | **13.1**
Median age | **33.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.6**
Number of persons per square kilometer | **100**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/79**
Infant mortality rate (number per 1,000 live births) | **9.6**
Population per physician/per nursing person | **460/110**
Daily calorie supply per capita (calories per person per day) | **3,514**

Education

Percent literate (male/female, total percentage) | **97/97, 97**
Number enrolled in secondary education as percentage of age group (male/female) | **77/93**
Number enrolled in higher education as percentage of population aged 20-24 | **28**

Labor force

Percent of labor force in agriculture/industry/services | **9/35/56**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **49.9**

STATUS OF WOMEN

Labor force participation rate (percent) | **52**
Number enrolled in secondary education as percentage of age group | **93**
Percent of women aged 15-49 using contraceptives | **79**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **77/23**

Population of major metropolitan areas

  city name | **Paris 2,299,830**

  city name | **Marseilles 908,600**

Average annual growth in cities of 20,000 or more (percent) | **0.8**

Average annual growth in rural areas (percent) | **-1.4**

Rate of total population growth (percent) | **0.38**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$9,760**

Greece

THE ULTIMATE CONSUMERS

Greece is at the bottom of the ladder of Ultimate Consumer countries, but it is slowly wending its way upward. By median age, birthrate, and rate of population growth, it should be a country that is nearing the Rocking Chair stage, but by economic status, education, urbanization, and industrial development, it has just left the Climber cluster.

As a result, Greece's entry into the European Community has not been easy. Despite the fact that it has strong agricultural and fishing industries that employ about 30 percent of the population, for example, Greece needs to modernize and update its food processing and packaging facilities to meet EC standards.

ELDERLY TO INCREASE SLOWLY

Of Greece's nearly 10 million people, only a fifth are age 15 and under. Thirteen percent of the population are age 65 and older. The median age in Greece is about 34 years. The age 65 and older group is projected to increase slowly--from 13.4 percent of the population in 1990 to 16.1 percent of the population by the turn of the century. The group under age 15 will be fairly stable at 20 percent of the population through the year 2000, given current expected trends in births and deaths. Greece should have no problems supplying new entrants for the labor force from now through the year 2000, even though its birthrate is only 11.8 and its annual population growth rate less than 1 percent.

WOMEN HAVE A LONG WAY TO GO

The role of women is important in Greece because it accounts for some of the factors that have kept Greece from full modernization. Among women in the appropriate age groups in Greece, only 76 percent are enrolled in secondary school, compared to 86 percent of boys. In total, only 17 percent of the population aged 20 to 24 are enrolled in college. Women account for only 35 percent of the labor force. Literacy figures show that only about 76 percent of women are literate, compared with 93 percent of men.

> ***Opportunities for employment are limited for women, in part because the services industry has been slow to grow in Greece.***

Opportunities for employment are limited for women, in part because the services industry has been slow to grow in Greece. Only 40 percent of the workforce find employment in services, where women have traditionally found the most opportunity. Twenty-nine percent of the Greek work force are in industry. The other 31 percent--the highest share among all the Ultimate Consumer countries--are employed in agriculture. The high level of employment in agriculture is one factor in the low annual GNP per capita of only $3,770. Unskilled workers--the ones usually found in agriculture--earn, on average, only one-quarter as much as a secretary or one-third as much as a bank teller.

Women are part of the labor force in nearly equal proportions in rural and urban areas. The difference is in the kind of work they do. In Greece as a whole, 52 percent of working women are salaried employees, 28 percent are non-paid family members, and less than 1 percent are employers. In urban areas, 4 percent are employers, 66 percent are salaried employees, and only 2 percent are considered non-paid family members.

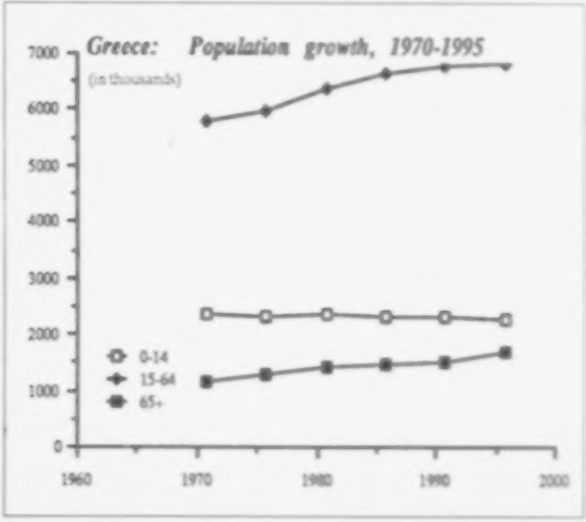
ONLY 51 PERCENT OF THE POPULATION IS MARRIED

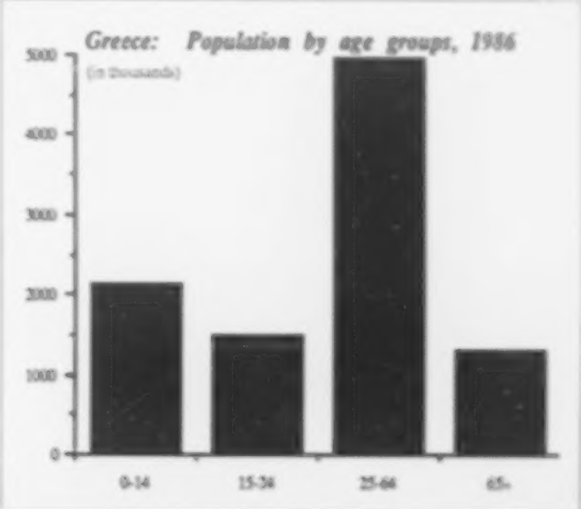
Greece shares with other Ultimate Consumers a decline in household size. In 1971, there were 2.5 million households in Greece. Now there are nearly 3 million households with an average size of 3.2 persons per household, down from 3.4 persons per household in 1971. While not everyone in Greece marries, the actual number of marriages has remained fairly stable since the 1960s, rising to 9.4 per thousand people in 1965 and going as low as 6.5 per 1,000 people in 1980.

Still, only 51 percent of the population are married. Nearly 42 percent have never married, 6 percent are widowed, and less than 1 percent are divorced, attesting to the sanctity of marriage in this country once it occurs. Greece may be one of the few Ultimate Consumer countries where there are more never-married men than women.

EDUCATION STILL A PROBLEM

Education, or the lack of it, is important to an understanding of Greece. Nearly 16 percent of the population aged 10 and older had not completed primary school in 1981. In 1981, only 4 percent of the population had completed higher education, according to data from the 10 percent sample of the census. Including the 4 percent who have completed higher education, 21 percent of the population aged 10 and older have completed high school and/or attained some education beyond secondary school. Three times as many men as women have completed a college degree. Compulsory education through high school (9 years of schooling) was instituted in 1981, so subsequent census figures should show increasing shares of the population to be better educated. All colleges are run by the state.





take a quick look at Greece

POPULATION

Total population (estimated 1986) | **9,959,669**
Rate of population growth (percent) | **0.29**
Lifetime births per woman (total fertility rate) | **1.68**
Birthrate (births per 1,000) | **11.81**
Death rate (deaths per 1,000) | **9.35**
Population under 15 (percent) | **20.5**
Population aged 65 plus (percent) | **13.4**
Median age | **34.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.8**
Number of persons per square kilometer | **75**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **74/79**
Infant mortality rate (number per 1,000 live births) | **12.5**
Population per physician/per nursing person | **390/370**
Daily calorie supply per capita (calories per person per day) | **3,601**

Education

Percent literate (male/female, total percentage) | **93/76, 85**
Number enrolled in secondary education as percentage of age group (male/female) | **86/76**
Number enrolled in higher education as percentage of population aged 20-24 | **17**

Labor force

Percent of labor force in agriculture/industry/services | **31/29/40**
Percentage of population of working age (aged 15-64) | **64**
Age-dependency ratio | **54.4**

STATUS OF WOMEN

Labor force participation rate (percent) | **34.7**
Number enrolled in secondary education as percentage of age group | **76**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **66/34**

Population of major metropolitan areas

city name | **Greater Athens 1,082,126**

city name | **Thessaloniki 406,413**

Average annual growth in cities of 20,000 or more (percent) | **1.1**

Average annual growth in rural areas (percent) | **-1.6**

Rate of total population growth (percent) | **0.3**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$3,770**

Hong Kong

THE ULTIMATE CONSUMERS

Japan's competitive-price loss in world export markets this year was Hong Kong's gain. After the disheartening 1982-84 business slump, anxiety over the territory's transition back into Chinese hands in 1997, and a meager growth rate of 0.8 percent in 1985, Hong Kong has come back and is moving again. Exports rose 13 percent in the first eight months of 1986.

All this means an expected 6 percent growth in GDP in 1986 and 5 percent growth in 1987. Positive indicators on sustained economic resurgence are revived private-sector investment, low inflation, a return to government budgets in the black after three years of red ink, and the rising fortunes of the People's Republic of China--a fortune that middle-man Hong Kong has much to do with. Pessimists look to uncertainty about the revision of the territories to the PRC, worries over the health of the financial sector, and loss of competitive edge to other Asian nations, especially Taiwan and South Korea who will be the main beneficiaries of the high yen. And, as do all Asian nations with heavily export-led economic growth, Hong Kong must worry about protectionist backlash.

Most expect Hong Kong's future strength to be aided by its ties to China, where a labor-intensive manufacturing sector can be backed up by Hong Kong's front-end services--marketing, product design, and tooling--and back-end and tertiary services--banking, shipping, testing, packaging, and customer service. Analysts see Hong Kong changing from a manufacturing center to a trading center, offering services to those trading with such areas as Shanghai and Canton.

Experts see the areas of computer-aided design and computer-aided manufacturing as growth areas for Hong Kong. The government, which is traditionally hands-off when it comes to supporting and nurturing industries (in contrast to South Korea, Taiwan, and Singapore), is pushing industry to move into advanced automation and precision manufacturing.

> ***Analysts see Hong Kong changing from a manufacturing center to a trading center, offering services to those trading with such areas as Shanghai and Canton.***

TURNING GRAY

Hong Kong is going gray. Due to low fertility and low mortality, the population is rapidly aging--much in the same vein as its European and American Ultimate Consumer counterparts. In 1986, 7.3 percent of the population were aged 65 and over, compared with only 2.8 percent in 1961. Hong Kong still has a younger population than the U.S., however. The proportion of Hong Kong residents under age 15 has almost halved since 1961 (from 41 percent to 22 percent) and is now close to that in the U.S. In 1986, the median age in Hong Kong was 28.1 years versus 31.7 years in the U.S.

Projections are that 10 to 11 percent of Hong Kong's population will be aged 65 and

*See the September 1983 issue of **International Demographics** for in-depth consumer information about Hong Kong. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

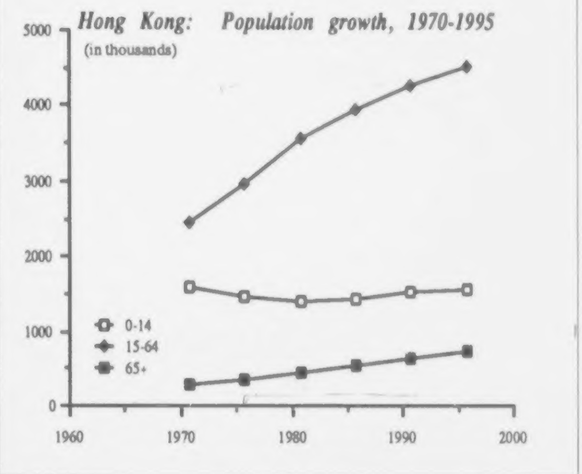
over by 2001, depending on future immigration trends. Those under age 15 should drop to about 21 percent of the total population by 2001. These figures suggest that greater dependency by the elderly will be offset by a shrinking younger population. The share of the population aged 15 to 64--those potentially in the labor force--has grown from 56 percent in 1961 to 69 percent in 1986.

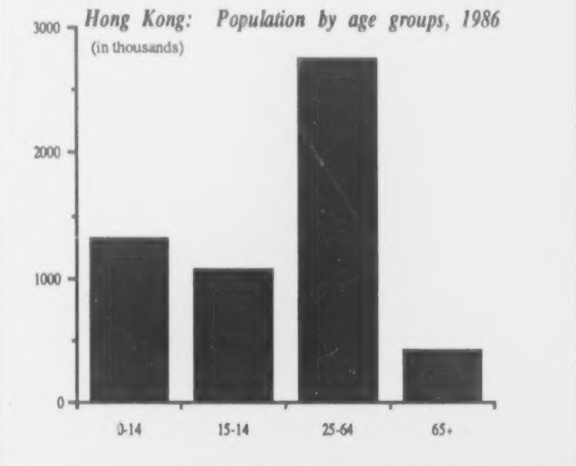
IMMIGRATION DRIVES POPULATION GROWTH RATE

Because of the sporadic nature of immigration, Hong Kong's growth rate fluctuates. Between 1971 and 1977, for example, it averaged 1.9 percent per year, while in 1978, 1979, and 1980, it was 3.4 percent, 6.3 percent, and 2.6 percent, respectively. In all previous census years, natural increase was the largest component of population growth. But from 1976 to 1981, net immigration was at an all-time high, lowering the share natural increase played to 42 percent of population growth.

Due to the large influx of immigrants in the late 1970s, the average annual growth rate between 1976 and 1981 averaged 2.8 percent a year despite falling fertility. Nearly 400,000 Chinese immigrants entered the country between 1978 and 1981. Hong Kong also received more than 50,000 Vietnamese boat people in 1979.

Counting an estimated 44,000 immigrants per year, the Hong Kong Census and Statistics Department predicts a population of 6.2 million people in 1991 and 7.1 million by 2001. Low fertility is expected to continue, hovering around 2.1 births per woman, or just at population replacement level. Due to later marriages, fewer women in their childbearing years, and preferences for fewer children, the number of lifetime births per woman in 1986 stood at about 1.55.





take a quick look at Hong Kong

POPULATION

Total population (estimated 1986) | **5,535,075**
Rate of population growth (percent) | **1.32**
Lifetime births per woman (total fertility rate) | **1.55**
Birthrate (births per 1,000) | **14.3**
Death rate (deaths per 1,000) | **4.74**
Population under 15 (percent) | **22.4**
Population aged 65 plus (percent) | **7.9**
Median age | **28.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **54.1**
Number of persons per square kilometer | **5,309**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **78/75/81**
Infant mortality rate (number per 1,000 live births) | **6.5**
Population per physician/per nursing person | **1,260/800**
Daily calorie supply per capita (calories per person per day) | **2,787**

Education

Percent literate (male/female, total percentage) | **90/64, 77**
Number enrolled in secondary education as percentage of age group (male/female) | **62/68**
Number enrolled in higher education as percentage of population aged 20-24 | **12**

Labor force

Percent of labor force in agriculture/industry/services | **2/51/47**
Percentage of population of working age (aged 15-64) | **69.7**
Age-dependency ratio | **45.4**

STATUS OF WOMEN

Labor force participation rate (percent) | **46**
Number enrolled in secondary education as percentage of age group | **68**
Percent of women aged 15-49 using contraceptives | **80**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **92/8**

Population of major metropolitan areas

city name | **Victoria 500,000**

city name | **Tsuen Wan New Town 599,000**

Average annual growth in cities of 20,000 or more (percent) | **2.1**

Average annual growth in rural areas (percent) | **-0.3**

Rate of total population growth (percent) | **1.3**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$6,330**

Ireland

THE ULTIMATE CONSUMERS

Advertisements to attract new industry to Ireland use its young, well-educated population as a drawing card. Of the Ultimate Consumer countries, Ireland has the highest birthrate and the lowest median age. It is one of the few countries in the industrialized world not facing the problem of an aging population within the next decade. Its birthrate is 17.4 births per thousand and its median age is just over 26--quite a difference compared with countries where the median age has hit the mid-30s and early 40s.

In other ways, Ireland has a lot of catching up to do with its industrialized neighbors. But it is one of the few places in Europe with a great deal of growth potential--and, except for its political troubles--one that is where the United States and other industrialized countries were in the 1950s.

URBAN GROWTH IS ON THE RISE

While between 75 and 80 percent of residents of most of the Ultimate Consumers live in urban areas, only 57 percent of Ireland's population are urban dwellers. Cities are growing at an average of 1.7 percent a year, whereas in most of the Ultimate Consumer countries, the major cities see less than 1 percent a year in growth and in some, most cities are losing population. In Ireland, the trend is toward population growth in the cities and especially in those cities in the eastern part of the country--in Leinster and Munster provinces.

Only19 percent of the Irish still work in agriculture. Thirty-four percent are in industry, with 48 percent in services--a lower rate than in most other European countries, except for countries such as Portugal and Greece. It is no wonder the government is working so hard to attract industry. Its unemployment rate--at around 15 percent--is one of the highest in Europe. There is little doubt that the unrest of the young contributes to the troubles the country is trying to overcome.

> ***Despite the relatively high birthrates in Ireland, the traditionally large Irish family is on the decline.***

Ireland's GNP per capita is estimated at $4,970--a low rate that leaves much room for growth in the coming years.

THE YOUNG DOMINATE

Thirty percent of the Irish are under age 15 and only 11 percent are over age 65, meaning that there is still a strong working age population to support the needs of the young and the old. The Irish are putting emphasis on education and trying to prepare their young for a more modern society. The government spent 6.2 percent of the GDP on education in 1982,

*See the April 1984 issue of **International Demographics** for in-depth consumer information about Ireland.*
Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

compared to only 5.5 percent in Italy, 5 percent in Japan, and 5.2 percent in France. But Ireland has some catching up to do. Only 88 percent of its young men who are eligible for secondary school are enrolled, and only 22 percent of its young people currently go on to a higher education.

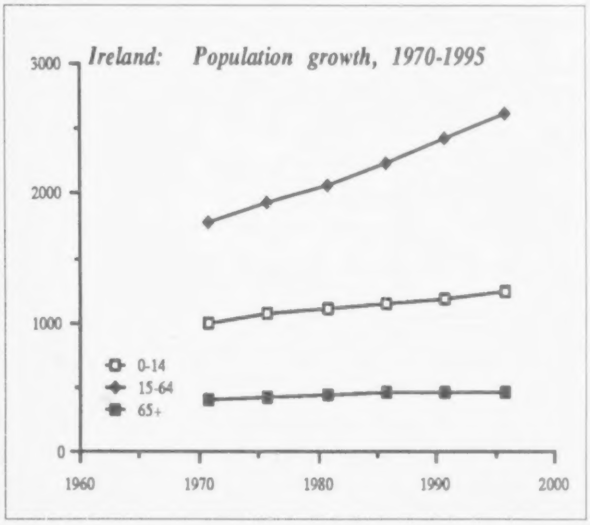
DIVORCE REMAINS OUTLAWED–SINGLE HOUSEHOLDS INCREASE

Ireland's shift into the 20th century is slow in many ways. While even Italy has adopted a policy to legalize abortion, Ireland remains steadfast in outlawing it. Last year, there was an attempt to legalize divorce, but that too was struck down. Census data on marital status are affected by Ireland's laws on divorce. Women who are not living with their legal husband, but who have not been able to obtain a divorce because it is against the law, still often choose to live with someone not their legal spouse. On census questionnaires, their only choice is to mark "married, widowed, or other status" so they end up in a married category even though they are not occupying a household with their legal spouse.

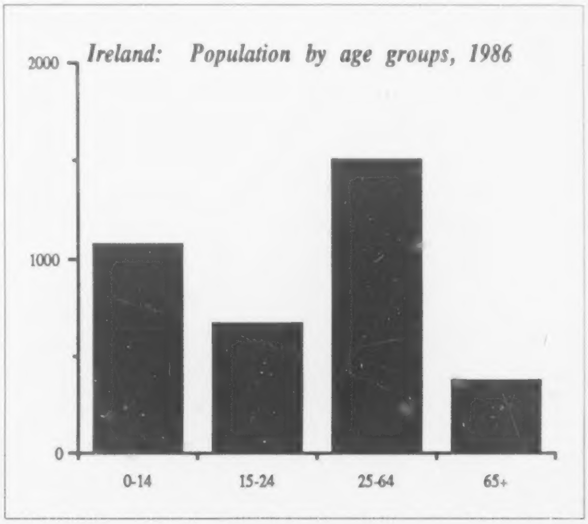
Despite the relatively high birthrates in Ireland, the traditionally large Irish family is on the decline. Average household size has declined from nearly 4 persons per household in the early 1970s to about 3.5 persons per household now. About 17 percent of households are one-person households, an increase of about 50 percent in the last decade. In Dublin, one-person households represent 24 percent of all households.

WORKING WOMEN ARE LIKELY SINGLE

With a higher share of Irish women than men attending high school, it is not surprising to find that 35 percent of women who are of working age are in the labor force. But unlike the United States where married women work in equal shares with single women, in Ireland about 64 percent of the women who work are single. The highest labor force rates are among younger women. About 30 percent of the total Irish labor force is women and women are nearly 49 percent of workers in the professional and technical category. Ireland's census includes an occupational category called "home duties" and twice as many women choose that category as some other occupational category.



Ireland: Population growth, 1970-1995



Ireland: Population by age groups, 1986

take a quick look at Ireland

POPULATION

Total population (estimated 1986) | **3,575,591**
Rate of population growth (percent) | **0.54**
Lifetime births per woman (total fertility rate) | **2.48**
Birthrate (births per 1,000) | **17.42**
Death rate (deaths per 1,000) | **9.19**
Population under 15 (percent) | **30.1**
Population aged 65 plus (percent) | **11.1**
Median age | **26.4**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **46.8**
Number of persons per square kilometer | **51**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/77**
Infant mortality rate (number per 1,000 live births) | **8.6**
Population per physician/per nursing person | **780/120**
Daily calorie supply per capita (calories per person per day) | **3,579**

Education

Percent literate (male/female, total percentage) | **98/94, 97**
Number enrolled in secondary education as percentage of age group (male/female) | **88/98**
Number enrolled in higher education as percentage of population aged 20-24 | **22**

Labor force

Percent of labor force in agriculture/industry/services | **19/34/48**
Percentage of population of working age (aged 15-64) | **59**
Age-dependency ratio | **70.7**

STATUS OF WOMEN

Labor force participation rate (percent) | **35.0**
Number enrolled in secondary education as percentage of age group | **98**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **57/43**
Population of major metropolitan areas
    city name | **Greater Dublin 915,115**
    city name | **Cork 149,792**
Average annual growth in cities of 20,000 or more (percent) | **1.7**
Average annual growth in rural areas (percent) | **0.3**
Rate of total population growth (percent) | **0.54**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$4,970**

Italy

THE ULTIMATE CONSUMERS

Italy--with the Vatican in its backyard and a reputation for great lovers among its population--is often misjudged. Roman Catholicism and great lovers do not necessarily equate with children. Among OECD countries, only West Germany has a lower birthrate. Despite bans by the church, 78 percent of women aged 15 to 49 use contraceptives.

At 10.5 births per thousand, its population is growing at less than 0.20 percent. The population in 1986 is estimated to be about 57.2 million, making Italy second only to West Germany in population among the European countries. If West Germany's population loss continues, Italy could overtake it in population around the turn of the century.

With a female life expectancy of 80 years and a male life expectancy of 73, Italy's population is expected to continue to grow, and it will age quickly. Half the population will be age 38 or older by the turn of the century. Still they won't match West Germany's age 41.

IN A YOUTHFUL STAGE

While Italy has the birthrate of a much older nation, its development is still in a youthful stage. Among the Ultimate Consumers it has one of the lowest rates of its labor force working in the services and nearly 12 percent of its workers are employed in agriculture.

As another indication of its youth, Italy has relatively low levels of school enrollment compared to other European countries. Fewer than three-quarters of its young men and women are enrolled in secondary school. Of those who do complete secondary school, a higher education is common. About 26 percent of those aged 20 to 24 are enrolled in some form of higher education. Overall, however, only about 3 percent of the population has higher education.

Italy is one of the few Ultimate Consumers where the urban/rural differences in the national market must be carefully considered.

Average household size is yet another indicator of its youthful stage in life. While other developed countries have as few as 2.1 to 2.5 persons per household, Italy still has about 3 persons per household. Household size in Italy is unlikely to go below 3 until nearly the turn of the century.

And while informal unions have caught on in nearly every other European nation, Italy is one of the holdouts. Marriage without benefit of a ceremony--and 86 percent of couples still choose a religious ceremony--is still unusual, as is divorce.

REGIONAL DIFFERENCES MATTER TO MARKETERS

The line separating the southern regions from those in the north is important. Italy is one of

See the February 1986 issue of International Demographics for in-depth consumer information about Italy. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

the few Ultimate Consumers where the urban/rural differences in the national market must be carefully considered. Each province should be examined for its individual characteristics since the north has already shifted to a service economy, and the south is just moving into its industrialization phase from having been more inclined toward agriculture.

While the median age of Italy is about 35 years, the median in a province such as Liguria--where retirees are likely to make their home--is age 42 and 18 percent of the population is aged 65 and older, compared with a national share of only about 13 percent. Household size varies by province as well. Liguria, the old folks home, has about 2.5 persons per household, whereas Puglia, a southern province that is one of the fastest-growing in the country, has about 3.4 persons per household.

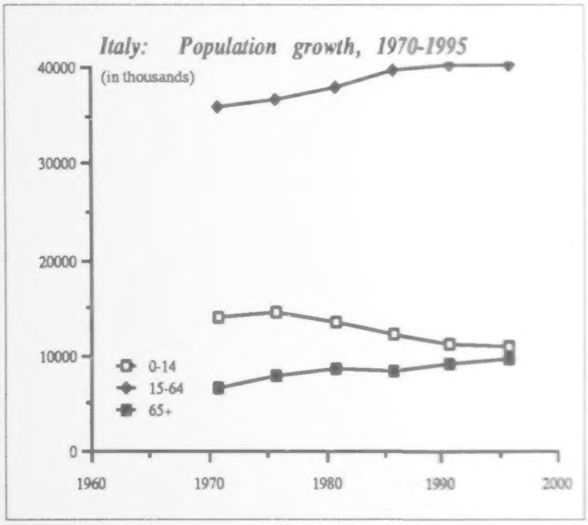
Working women are not as prevalent in Italy as in some other well-developed countries, although there are indications that more of them would be working if the jobs were available. Again, there are substantial regional variations. In the developed north, nearly 37 percent of women work in provinces such as Emilia Romagna, whereas in the more traditional south in provinces such as Sicilia, only about 18 percent of women work outside the home. These variations create substantially different needs and wants as consumers. The women in northern provinces are more likely to be able to afford and to need time-saving appliances, for example.

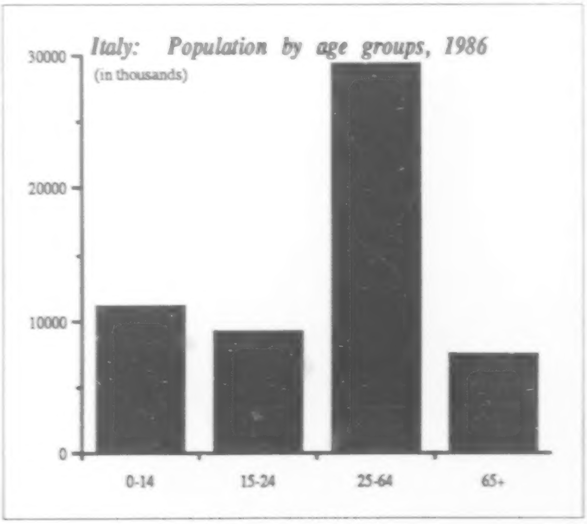
Birthrates, too, range from as high as 14 or 15 births per thousand in some southern provinces to as low as 6 and 7 births per thousand in Liguria, Valle d'Aosta and Emilia Romagna.

The Italians are a hardy bunch and the Center for International Research now estimates that Italian women have a life expectancy of about 80 years, one of the highest in the world.

UNDERGROUND LABOR FORCE

While Italy's GNP per capita is estimated at only $6,420, one of the lower rates among Western European nations, that figure does not take into account the underground economy. Because of the submerged economy, the 170 percent difference officially reported between the per capita GDP of the richest province, Valle d'Aosta, and the poorest, Calabria, may be overstated. While GNP per capita is estimated at only about $6,400, mean annual household budgets reported in 1983 varied from the equivalent of $11,950 in Lombardia to $7,400 in Molise, with a national average of $10,026. And, true to their image, the consumption of cereals (including pasta) accounts for nearly 4 percent of the average household budget.





take a quick look at Italy

POPULATION

Total population (estimated 1986) | **57,244,689**
Rate of population growth (percent) | **0.19**
Lifetime births per woman (total fertility rate) | **1.42**
Birthrate (births per 1,000) | **10.53**
Death rate (deaths per 1,000) | **9.71**
Population under 15 (percent) | **18.6**
Population aged 65 plus (percent) | **13.4**
Median age | **35.4**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **48.5**
Number of persons per square kilometer | **189**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **73/80**
Infant mortality rate (number per 1,000 live births) | **8.6**
Population per physician/per nursing person | **750/250**
Daily calorie supply per capita (calories per person per day) | **3,521**

Education

Percent literate (male/female, total percentage) | **98/94, 97**
Number enrolled in secondary education as percentage of age group (male/female) | **74/71**
Number enrolled in higher education as percentage of population aged 20-24 | **26**

Labor force

Percent of labor force in agriculture/industry/services | **12/41/48**
Percentage of population of working age (aged 15-64) | **67**
Age-dependency ratio | **49.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **40.7**
Number enrolled in secondary education as percentage of age group | **71**
Percent of women aged 15-49 using contraceptives | **78**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **72/28**

Population of major metropolitan areas

city name | **Rome 2,834,094**

city name | **Milan 1,580,810**

Average annual growth in cities of 20,000 or more (percent) | **0.9**

Average annual growth in rural areas (percent) | **-1.4**

Rate of total population growth (percent) | **0.19**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$6,420**

Japan

Is the Japanese miracle ending? Not on your life. Reshaping itself, for sure. After the yen soared 40 percent against the dollar and GNP growth lagged due to falling exports (measured in yen), Japan embarked on a new tack--supporting growth through domestic sources rather than exports. This adjustment will speed Japan's already heady transition from a manufacturing-based to a service-based economy, as Japanese businesses move offshore to manufacture what they used to make at home and further automate the domestic manufacturing industry. Increasingly, Japan will expand its role as a trading center with advanced systems for communications, financial transactions, and other services.

Last year's 40 percent rise of the yen against the dollar slowed GNP growth this year to about 2 to 3 percent, but Japanese businessmen expect increased recovery in 1987 as the benefits of cheap oil come to the fore. Private forecasters see the Japanese economy growing at 3 to 4 percent in 1987.

GETTING OLDER

Not only is Japan's economy at a turning point, but so is its rapidly aging population. Japan's 1986 population of 121.4 million will continue to grow slowly to 127.6 million in the year 2000 and 128.5 million in 2020, and by far the fastest growing age group will be those over age 60.

In 1980 about 13 percent of its population was over 60. By the year 2000, this proportion will surge to about 21 percent of the population; by 2020, to 26.5 percent. The proportion of youth--those aged 15 and under--which made up 23.6 percent of the population in 1980 will continue to decline, making up only 17.5 percent of the population in the year 2000.

> ***Promoting an entire lifestyle--particularly one that appeals to the young Japanese woman who feels hemmed in by the conventionality of Japanese society--rather than selling an individual product is Japan's new wave in marketing.***

WORKING WOMEN TO PICK UP THE SLACK

As Japan's population ages, so will its work force. Dwindling numbers of youth who traditionally provide cheap, flexible labor will be increasingly replaced by married women--women used to career breaks and desiring flexible hours. So far, the trend in Japan has been for women who have routinely quit work in their mid-20s to raise families to return to work part-time after their children (usually two closely spaced) enter primary school.

Women over 35 are returning to work in increasing numbers for reasons of both personal fulfillment and economic necessity. Those over 35 find themselves with their children in school, educated minds, and long stretches of free time before them. Of the nearly 15 million women who work, about 5

See the November 1982 issue of **International Demographics** *for in-depth consumer information about Japan. Back issues are $10 each and are available by calling toll free, 800-828-1133; in New York call 800-462-6006.*

million hold down part-time jobs. The majority of these women, however, occupy low-level, low-paying jobs.

However, the new Japanese woman is beginning to make inroads into previously all-male professions. Due to a shortage of new male entrants in the labor force, young women are now entering such previously men-only professions as computer programming. Some are even beginning to hold influential positions in Japan's fast-growing service and retailing sector. Other forces are sure to catapult Japan's urban, educated women into senior positions. The industries slated to grow quickly in the newly emerging Japanese economy are exactly the ones where women fit most comfortably in the senior ranks--the information industry, financial services, tourism, and design.

GETTING RICHER

Not only is the population getting older, it is getting richer too. Like it or not, the income of the average Japanese now tops that of the average American, at $18,000 and $17,000, respectively. But, although by the year 2000 the largest consumer group will be over 35, the young singles market looks like the wave of the future as far as discretionary income expenditure goes.

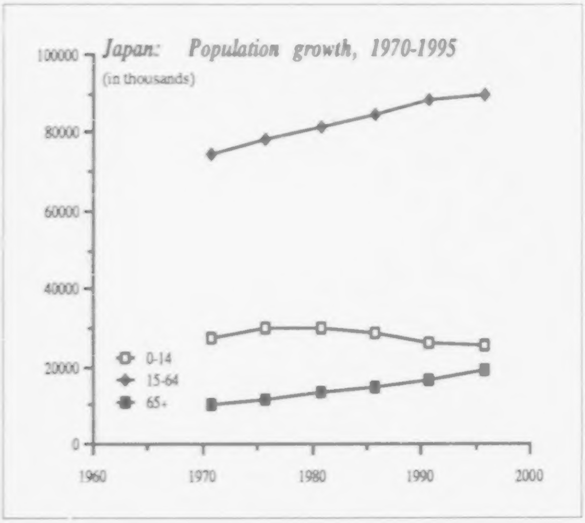
Young single workers are the envy of married employees with families to support. In 1980, young single workers spent roughly $220 a month--a third of their entry-level salaries--on food and housing. About another third was spent on leisure, entertainment, cultural activities, and education. Thirteen percent was spent on clothing--nearly double that spent by the average household--and only 5 percent on durables.

Young working women (who usually live at home with their parents) are one of Japan's strongest consumer groups. With marriage increasingly delayed to between the ages of 24 and 27, they have a relatively large amount of discretionary income, spending nearly 16 percent of their total income on leisure.

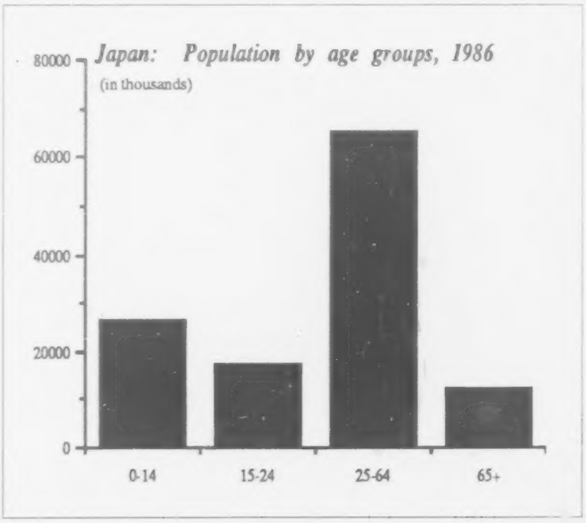
WOOING THE WOMAN CONSUMER WITH FEELING

"I detest the type of publicity that chants the name of the product over and over. Instead, I simply address a letter to the Japanese people." So says Eiko Ishioka, Japan's most successful figure in advertising art. Promoting an entire lifestyle--particularly one that appeals to the young Japanese woman who feels hemmed in by the conventionality of Japanese society--rather than selling an individual product is Japan's new wave in marketing.

The more illusive, innovative, and controversial the images, the better. The direct, effective, informative approach does not sit well with a consumer looking for the unexpected and creative as a way of perking up her routine life.



Japan: Population growth, 1970-1995
(in thousands)



Japan: Population by age groups, 1986
(in thousands)

take a quick look at Japan

POPULATION

Total population (estimated 1986) | **121,456,182**
Rate of population growth (percent) | **0.56**
Lifetime births per woman (total fertility rate) | **1.85**
Birthrate (births per 1,000) | **12.45**
Death rate (deaths per 1,000) | **6.82**
Population under 15 (percent) | **21.0**
Population aged 65 plus (percent) | **10.5**
Median age | **35.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **50.0**
Number of persons per square kilometer | **323**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **78/75/80**
Infant mortality rate (number per 1,000 live births) | **5.8**
Population per physician/per nursing person | **740/210**
Daily calorie supply per capita (calories per person per day) | **2,653**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **92/93**
Number enrolled in higher education as percentage of population aged 20-24 | **30**

Labor force

Percent of labor force in agriculture/industry/services | **9/35/56**
Percentage of population of working age (aged 15-64) | **69**
Age-dependency ratio | **45.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **57**
Number enrolled in secondary education as percentage of age group | **93**
Percent of women aged 15-49 using contraceptives | **56**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **77/23**
Population of major metropolitan areas
    city name | **Tokyo 11,892,016**
    city name | **Yokohama 2,773,674**
Average annual growth in cities of 20,000 or more (percent) | **0.6**
Average annual growth in rural areas (percent) | **0.3**
Rate of total population growth (percent) | **0.5**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$10,630**

Luxembourg

THE ULTIMATE CONSUMERS

Marketers who are seeking trial markets in Europe may well wish to focus on Benelux--three small but affluent markets that together provide a market of about 25 million people. Of the three, Luxembourg is the smallest--only 366,000 people--and it has the lowest density per square kilometer. It also is growing more slowly than any of the three because its birthrate is the lowest--about 11 births per thousand.

A COUNTRY OF URBAN DWELLERS

Only 18 percent of Luxembourg's population live in rural areas. Only about 4 percent of its workforce are engaged in agriculture. But the only large city of any size is the capital which shares the country's name. It contains about 22 percent of the population. The next largest city--Esch-sur-Alzette--has only about 25,000 people. Thus, while it is highly urbanized, the majority of its cities have fewer than 10,000, resulting in an urbanization pattern much different than that of such countries as the United Kingdom or France.

Of the European Community countries, Luxembourg entertains the greatest proportion of immigrants relative to its population. About 26 percent of its population are foreigners, of which the Portuguese are the largest immigrant group. For the most part, immigrants have been easily assimilated into the society. Foreigners take about 90 percent of construction jobs, and more than 50 percent of industrial jobs. As in Switzerland, foreigners are welcome due to public awareness that their labor is a necessity. The unemployment rate in Luxembourg is only about 2 percent, next to Switzerland the lowest in all of Europe.

> ***Luxembourg's former premier suggested that the falling birthrate indicated a "collective tendency toward suicide."***

IMMIGRANTS HELP EASE AGING PROBLEM

The median age of Luxembourgers is 36.4 years. The young still outnumber the old. Those aged 65 and older make up 15 percent of the population, while those under age 15 are 17 percent of the population. While the population is aging, just as in Switzerland, the immigrant population helps to keep the age distribution in balance. People aged 20 to 29 are 16 percent of the population, primarily because immigrants most likely fall within this age group. While the overall birthrate is 11.1 per thousand people, it is only 10.7 for Luxembourg natives and 13.5 for immigrants.

Luxembourgers are actually on the decline while aliens are on the increase, leading political officials to worry that the country is

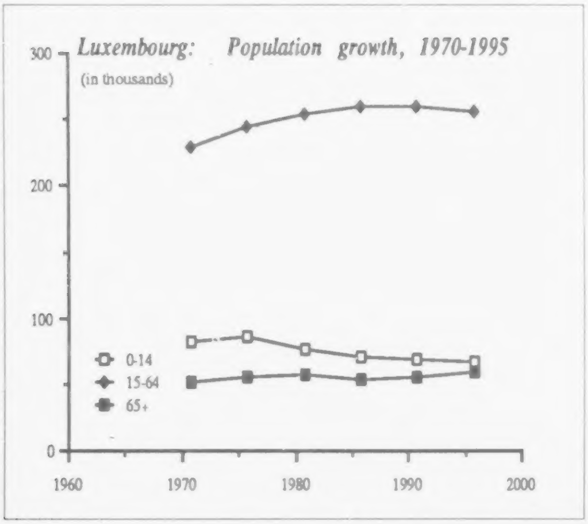
*See the September 1985 issue of **International Demographics** for in-depth consumer information about Luxembourg. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

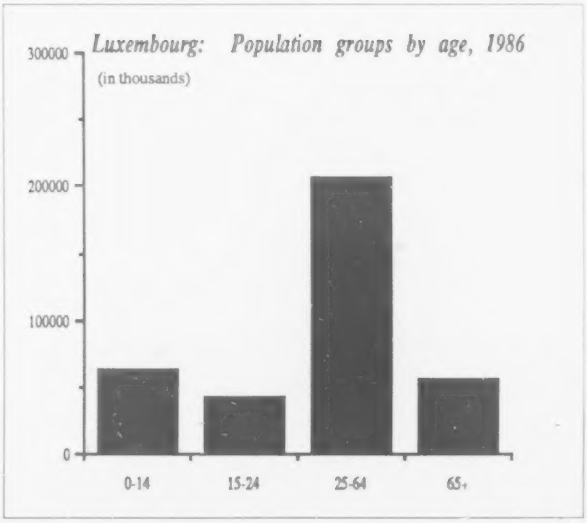
experiencing an identity crisis. The former premier suggested that the falling birthrate indicated a "collective tendency toward suicide."

A STABLE, AFFLUENT SOCIETY

Be that as it may, Luxembourgers seem happy with their lot in life. And why shouldn't they be with a standard of living that is among the highest in the world.

Among OECD countries, Luxembourg has the highest rate of take-home pay after tax and social security contributions. Including family benefits, a Luxembourg worker in manufacturing can expect to call 94.2 percent of his paycheck his own. Luxembourgers own 385 passenger cars per thousand, 336 televisions per thousand, and by their own reckoning have almost the highest number of telephones per thousand in Western Europe at 589.





take a quick look at Luxembourg

POPULATION

Total population (estimated 1986) | **366,360**
Rate of population growth (percent) | **-.03**
Lifetime births per woman (total fertility rate) | **1.61**
Birthrate (births per 1,000) | **11.13**
Death rate (deaths per 1,000) | **11.46**
Population under 15 (percent) | **17.1**
Population aged 65 plus (percent) | **15.1**
Median age | **36.4**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.8**
Number of persons per square kilometer | **140**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **72/79**
Infant mortality rate (number per 1,000 live births) | **7.1**
Population per physician/per nursing person | **NA**
Daily calorie supply per capita (calories per person per day) | **NA**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **65/68**
Number enrolled in higher education as percentage of population aged 20-24 | **NA**

Labor force

Percent of labor force in agriculture/industry/services | **5/25/70**
Percentage of population of working age (aged 15-64) | **68.6**
Age-dependency ratio | **44.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **39.1**
Number enrolled in secondary education as percentage of age group | **68**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **82/18**

Population of major metropolitan areas

city name | **Luxembourg-Ville 78,991**

Average annual growth in cities of 20,000 or more (percent) | **0.7**

Average annual growth in rural areas (percent) | **-3.6**

Rate of total population growth (percent) | **-.03**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$11,412**

New Zealand

THE ULTIMATE CONSUMERS

New Zealand and Australia have almost the same birthrate--about 15 births per thousand, but Australia's population is growing at more than 1 percent a year and New Zealand's is growing at less than one percent a year. What makes the difference? Immigration and death rates. New Zealand has little gain from new immigrants and a slightly higher death rate than Australia's.

But no matter. Small New Zealand with its 3.3 million population is used to living in the shadow of the much larger Australia. Comparisons between the two traditionally Western nations amid Asia are inevitable, and differences abound. While Australia is one of the younger of the Ultimate Consumers, New Zealand is even younger with a median age of 28.9 years. Twenty-four percent of its population are younger than age 15 and only 10.5 percent are aged 65 and older.

New Zealand is made up of two islands. Between 1976 and 1981, the population of North Island increased by 2.4 percent to 2.3 million while the population of South Island decreased by 1 percent. The decrease is not due to low birthrates or high death rates. Migration is the culprit. More people are leaving for overseas or for North Island than are coming to South Island to settle.

HIGHLY URBANIZED, SMALL MARKET

As a small market, New Zealand may be overlooked, but its high rate of urbanization--84 percent--means that the population is relatively concentrated. The overall population density is 12 persons per square mile.

Until 1976 New Zealand's urban areas grew quickly because of the development of manufacturing and services industries which attracted people to the new jobs they provided. The majority of immigrants tended to settle in the urban areas and rural residents were enticed by the better social, cultural, educational, and economic opportunities. Now the rate of urbanization appears to be stabilizing. Gains now in rural areas appear to be mainly an expansion of the suburban areas that lie outside the seven largest cities. The greatest rural growth in a statistical division was around Auckland where the population increased by 12 percent.

> ***While Australia is one of the younger of the Ultimate Consumers, New Zealand is even younger with a median age of 28.9 years.***

While the population has tended to move from South Island to North Island, it also is drifting from the southern part of North Island to the northern part. One reason is that dairy farming has changed and processing factories and services to dairy farmers have become more important. Also, astute manufacturers and processors try to locate their factories as close as possible to the major markets and those are on the northern part of North Island. As in other developed countries, inner cities that previously lost population to the suburbs are beginning to see gains again as new multi-story apartment buildings are constructed and urban professionals seek to minimize their commute by living closer to their work.

FEWER CHILDREN, MORE SINGLE PARENTS

The trends in New Zealand's households mirror those of most other Ultimate Consumer countries: fewer children per family, an increasing percentage of childless couples, a decline in two-parent families, and an increase in the number of single-parent families. Since 1976, there has been an increase of 19 percent in one- and two-person households so that they now make up 48 percent of all households. In 1981, there were just over 1 million private households in New Zealand.

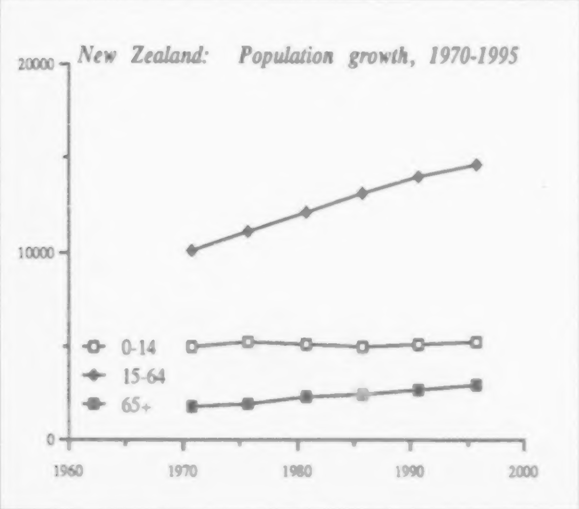
Sixty-six percent of the households in New Zealand contain one family. Eighty-four percent of those, or 556,000 households, are considered "complete" families with two parents and one or more unmarried children living at home. Eleven percent of family households are single-parent families with children. Eighteen percent of all households, or about 185,000 households, contain only one person.

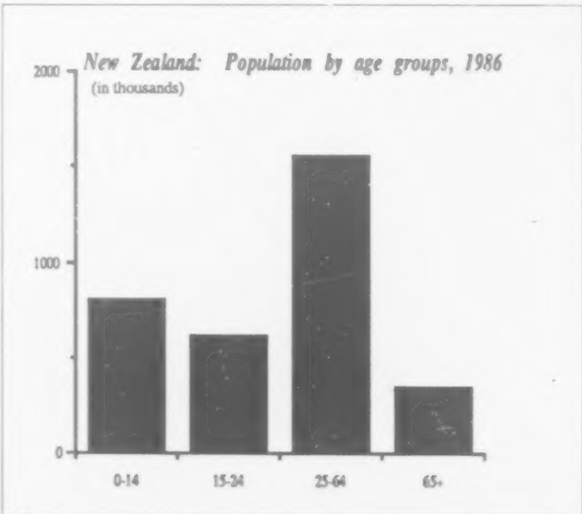
Of the 207,000 households with a married couple and no children, the majority are older couples whose children are no longer at home, rather than childless couples who may still bear children. A third are headed by someone aged 65 and older. Thirty-seven percent are headed by someone aged 45 to 64. These couples are people who are interested in travel, often have more leisure time than couples with children, and who often have money available for investments and luxury items. Of the 348,400 households with children, 39 percent have two children and 28 percent have one child. Only 3 percent have five or more children.

SPENDING UP ON LEISURE-TIME AND RECREATIONAL ITEMS

Annual consumer expenditure surveys in New Zealand provide detailed information on spending patterns. For example, while spending on most items has been relatively stable as a proportion of total income, spending on equipment and services for educational, cultural, leisure-time, and recreational purposes has increased. Rents are also increasing as a proportion of average weekly expenditure as are household services.

Eighty-three percent of New Zealand households have a car, 13 percent have a motorcycle, and 35 percent have a bicycle. New Zealanders are not, by and large, two-car families. Electricity is more in use than gas. Ninety-four percent of households have an electric cooking stove, and only 6 percent have a gas range.





take a quick look at New Zealand

POPULATION

Total population (estimated 1986) | **3,278,182**
Rate of population growth (percent) | **0.89**
Lifetime births per woman (total fertility rate) | **1.91**
Birthrate (births per 1,000) | **15.85**
Death rate (deaths per 1,000) | **8.12**
Population under 15 (percent) | **24.1**
Population aged 65 plus (percent) | **10.5**
Median age | **28.9**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **51.4**
Number of persons per square kilometer | **12**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/78**
Infant mortality rate (number per 1,000 live births) | **10.6**
Population per physician/per nursing person | **590/110**
Daily calorie supply per capita (calories per person per day) | **3,493**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **80/82**
Number enrolled in higher education as percentage of population aged 20-24 | **28**

Labor force

Percent of labor force in agriculture/industry/services | **11/33/56**
Percentage of population of working age (aged 15-64) | **65**
Age-dependency ratio | **52.2**

STATUS OF WOMEN

Labor force participation rate (percent) | **45.8**
Number enrolled in secondary education as percentage of age group | **82**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **84/16**
Population of major metropolitan areas
city name | **Wellington 342,500**
Average annual growth in cities of 20,000 or more (percent) | **0.8**
Average annual growth in rural areas (percent) | **0.3**
Rate of total population growth (percent) | **0.9**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$7,730**

Norway

THE ULTIMATE CONSUMERS

Although Norway's consumer price index has increased more than some of its neighbors' have in the past year, and its economy has suffered slightly from the decline in oil prices, it is still a prosperous country that holds prospects for U. S. goods and services.

FULL EMPLOYMENT

Along with its Scandinavian neighbors, Norway has relatively low rates of unemployment. Even in 1986 when other OECD countries were reporting unemployment of 12 and 13 percent month after month, Norway reported only about 2 percent unemployment. In the middle of 1986, only Switzerland had a lower unemployment rate. This accounts in part for its relatively high per capita income of $13,000 and its high GNP per capita of nearly $14,000.

Another factor adding to its high GNP per capita is that women make up nearly 43 percent of the labor force. Among women, 66 percent are in the labor force. The employment rate for women grew 25 percent between 1975 and 1983. Of that additional employment, only about 5 percent were full-time.

Of the nearly 2 million people in the labor force, nearly 65 percent work in services, 29 percent work in industry, and only 7 percent are employed in agriculture, which includes fishing and forestry, two strong segments in Norway. One reason the market for computers and peripherals, especially software, is fairly strong in Norway is that service businesses have been computerizing to make their services more efficient.

POPULATION TO GROW SLOWLY

One fifth of the market in Norway is aged 15 and under. But because Norway had a baby boom, the younger age groups are shrinking as the working age population grows. The age 65 and over population now amounts to 15.9 percent of the population. The age 65 and over group will increase slightly as a percentage of the population through 1990 and then will begin to decline slowly again until 2020.

Women make up nearly 43 percent of Norway's workforce.

The total Norwegian population is now 4.1 million and is expected to continue to grow slowly. By 1990, the population is expected to number 4.2 million and by the year 2000, about 4.3 million. With the working age population continuing in such a stable relationship with the dependent population well into the next century, Norway's prospects for continued prosperity are good. It could experience a problem with a lack of new entrants to the labor force, especially in the tourism area where it has shown strong growth in the last few years.

See the November 1983 issue of International Demographics for in-depth consumer information about Norway. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

COUNTRY LIFE STILL PREVALENT

With only about 73 percent of its population living in urban areas, Norway's residents do not have as easy access to retail stores and other services as do the residents of some other OECD countries. For example, in Japan, a survey found that 96 percent of the people in private households were less than 15 minutes walking distance from a store that would satisfy their daily needs. This allows the Japanese woman to use her neighborhood store as her pantry. In Norway, by comparison, only 74 percent of those surveyed could satisfy their daily needs within a 15-minute walk. Ten percent cited that type of retail establishment as being a 30-minute walk away. Even among urban residents, only 90 percent said they were within a 10-to-15-minute walk of a store.

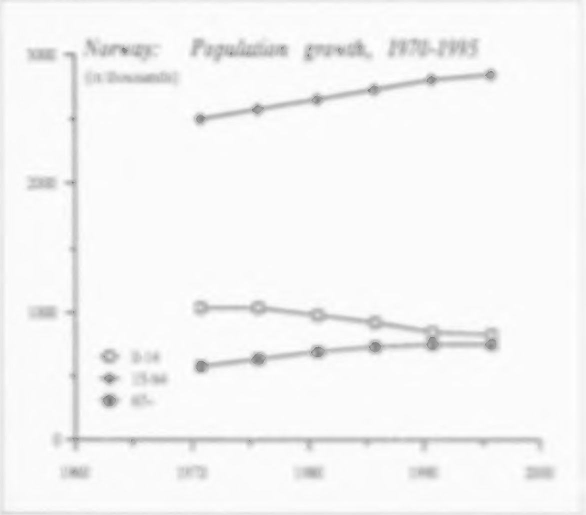
While some developed countries such as Japan are saturated with retail stores, Norway could be an exception. Convenience stores may do well there, given the level of education, the high percentage of working women, and some indications that people in suburban and rural areas are not served by stores nearby.

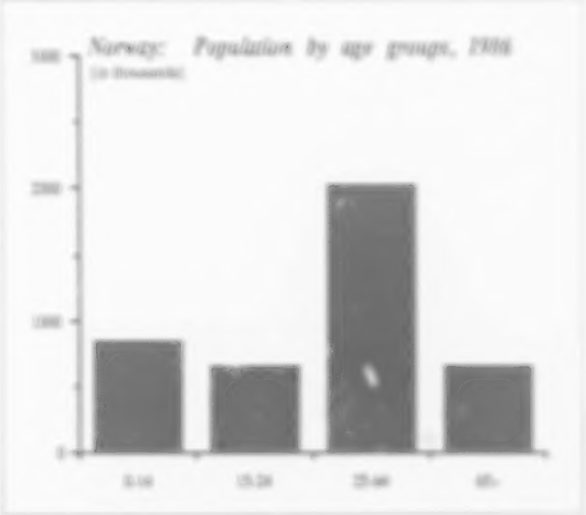
MANY ELDERLY RESTRICTED DUE TO HEALTH PROBLEMS

Although there are only about 63,000 people aged 65 and older in Norway, their health is comparatively worse than the health of those living in some neighboring countries. A survey finds that 60 percent of people aged 65 and older said they were restricted to a great extent in their daily activities because of a long-standing health condition. In Sweden, for example, only 22 percent of the population in the same age group said they had restrictions on their daily activities.

Even among 45-to-64-year-olds in Norway, 38 percent of the population said they were restricted because of health concerns. Despite slow growth in Norway's elderly population, there will be at least parallel growth in the number of people in Norway and those in neighboring countries who feel restricted in their activities. Some of the elderly, therefore, will be attracted to climates that allow them greater activity and make them feel better; others will be greatly restricted in their ability to travel and make use of leisure-time facilities, slowing the growth of these areas of the economy.

Among seven Ultimate Consumer countries, Norwegians also showed by far the highest number of "bed" days--or days they were ill enough to be home in bed. Among 15-to-24-year-olds, there was an average of 10 bed days in Norway, but only 5 or fewer in countries such as The Netherlands, Canada, and Finland. Among those aged 65 and over, the number of bed days in Norway was 18, while it was 13 or less in the other countries. The most likely people to spend time in bed in Norway were those living in urban areas, with residents of large metropolitan areas having the highest average number of days.





take a quick look at Norway

POPULATION

Total population (estimated 1986) | **4,165,822**
Rate of population growth (percent) | **0.31**
Lifetime births per woman (total fertility rate) | **1.68**
Birthrate (births per 1,000) | **12.42**
Death rate (deaths per 1,000) | **10.67**
Population under 15 (percent) | **19.6**
Population aged 65 plus (percent) | **15.9**
Median age | **34.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.9**
Number of persons per square kilometer | **13**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **76/73/80**
Infant mortality rate (number per 1,000 live births) | **8.0**
Population per physician/per nursing person | **460/70**
Daily calorie supply per capita (calories per person per day) | **3,088**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **95/98**
Number enrolled in higher education as percentage of population aged 20-24 | **28**

Labor force

Percent of labor force in agriculture/industry/services | **7/28/65**
Percentage of population of working age (aged 15-64) | **64.5**
Age-dependency ratio | **55.5**

STATUS OF WOMEN

Labor force participation rate (percent) | **66**
Number enrolled in secondary education as percentage of age group | **98**
Percent of women aged 15-49 using contraceptives | **71**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **73/27**

Population of major metropolitan areas

city name | **Oslo 447,257**

city name | **Bergen 207,332**

Average annual growth in cities of 20,000 or more (percent) | **0.9**

Average annual growth in rural areas (percent) | **-1.3**

Rate of total population growth (percent) | **0.3**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$14,000**

Singapore

THE ULTIMATE CONSUMERS

Singapore's squeaky-clean streets and "sunrise industries" of information technology are the futurologist's dream come true. The skills, knowledge, and motivation of the "garden city's" 2.5 million people, who live on an island only 42 by 22 kilometers, brought this tiny state the highest per capita income of any Asian nation barring Japan. Without raw materials, the cumbersome inertia of heavy industry, and the tradition of the dole, Singapore became the prototype information society--one in which 70 percent of its GNP comes from the service sector.

SINGAPOREAN ECONOMY REVIVES

Singapore's economy is finally beginning to rally, raising hopes for a comeback after GDP shrunk by 1.8 percent last year--the first contraction of the economy in two decades. Predictions vary, but GDP growth is estimated at anywhere from 0.5 percent to 0.8 percent in 1986, 2.5 percent to 3 percent in 1987, and 4 percent to 6 percent in 1988. However, the rapid wage increases and steep rises in living standards (average weekly earnings rose by 14 percent in 1981,15.3 percent in 1982, and 9 percent in 1983) of the 1970s and early 1980s are gone from the picture.

Annual GDP growth between 1976 and 1986 averaged 6.8 percent. Singapore's demographics are another plus. Singapore's population grew 16.4 percent during the 1970s, up from 2 million. A successful family planning policy kept the average annual growth rate at 1.5 percent between 1970 and 1980, compared with an annual rate of 2.8 percent during the 1960s.

FEWER BABIES, MORE ELDERLY

Although the Singaporean population is younger than that of the U.S., it is aging for the same reasons--declining fertility and the disproportionately large group of post-war baby-boomers pushing into mid-life. In 1970, almost 40 percent of the population were under age 15 and less than 6 percent were aged 60 and over. But, by 1980, those under age 15 fell to only about 27 percent of the population while those aged 60 and over had grown to 7 percent of the population. By the year 2000, about 11 percent of the population are expected to be aged 60 and over. By 2020, 22.8 percent of the population will be elderly.

> ***With 70 percent of Singapore's GNP generated by the service sector, Singapore is a futurologist's dream come true.***

Singapore has its highly educated youth as assurance for the future. Ten percent of its high school graduates attend college. For those who don't attend college, technical training is readily available.

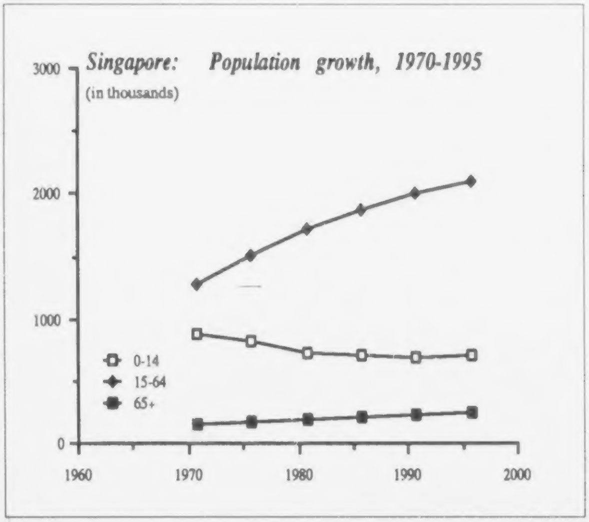
Due to its rapidly expanding economy, Singapore has been able to employ almost all of its disproportionately large group of post-war baby boomers. Unemployment in 1981

See the July 1982 issue of ***International Demographics*** *for in-depth consumer information about Singapore.*
Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.

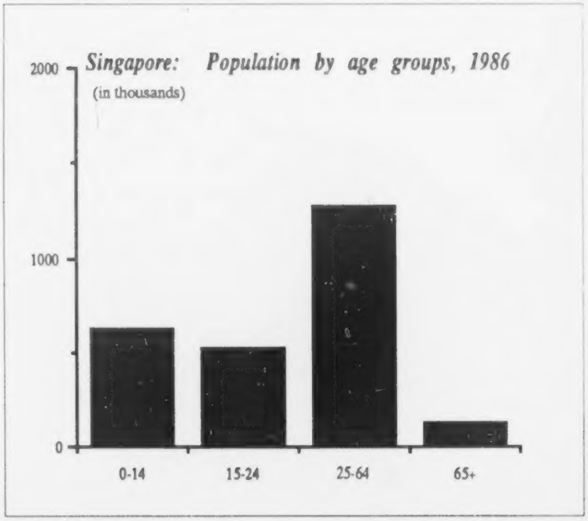
ran only at 2.9 percent, 2.6 percent in 1982, and 3.2 percent in 1983.

WOMEN IN THE WORKFORCE

About 46 percent of Singaporean women work. The availability of foreign domestic help, especially Malays and Filipinos, has helped support this participation rate. Those in the workforce average about 2.4 children per woman, as compared with 3.8 children per non-working woman. Educational attainment for women also has climbed steeply. The number of literate women grew 64 percent between 1970 and 1980. In the last 10 years, secondary school enrollment for women has increased two times faster than the rate for men.


Singapore: Population growth, 1970-1995

(in thousands)


Singapore: Population by age groups, 1986

(in thousands)

take a quick look at Singapore

POPULATION

Total population (estimated 1986) | **2,586,919**
Rate of population growth (percent) | **1.13**
Lifetime births per woman (total fertility rate) | **1.62**
Birthrate (births per 1,000) | **16.58**
Death rate (deaths per 1,000) | **5.24**
Population under 15 (percent) | **23.9**
Population aged 65 plus (percent) | **5.3**
Median age | **27.2**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **60.0**
Number of persons per square kilometer | **4,404**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **73/70.5/76**
Infant mortality rate (number per 1,000 live births) | **9.7**
Population per physician/per nursing person | **1,100/340**
Daily calorie supply per capita (calories per person per day) | **2,636**

Education

Percent literate (male/female, total percentage) | **83/54, 69**
Number enrolled in secondary education as percentage of age group (male/female) | **65/65**
Number enrolled in higher education as percentage of population aged 20-24 | **12**

Labor force

Percent of labor force in agriculture/industry/services | **2/38/61**
Percentage of population of working age (aged 15-64) | **41**
Age-dependency ratio | **42.1**

STATUS OF WOMEN

Labor force participation rate (percent) | **45**
Number enrolled in secondary education as percentage of age group | **65**
Percent of women aged 15-49 using contraceptives | **71**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **100/0**

Population of major metropolitan areas
city name | **Singapore City 1,520,000**

Average annual growth in cities of 20,000 or more (percent) | **1.2**

Average annual growth in rural areas (percent) | **8.1**

Rate of total population growth (percent) | **1.1**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$7,260**

Spain

THE ULTIMATE CONSUMERS

Spain is one of the youngest countries in the European Community. With a median age of 30.9 years and nearly 23 percent of its population under age 15, Spain is still readily influenced by its young.

As a country with a relatively young population compared with other Ultimate Consumers, Spain's standard of living is one of the lowest in the Community. Annual per capita income is estimated at $4440. The Spanish government is concerned about raising this standard of living. One area is health, where the government has committed itself to a long-term National Health Plan that will improve the quality of medical care.

Because only 12 percent of Spain's population is aged 65 and over, a fairly large share of its 38.8 million residents--64 percent--are of working age.

SPANISH LIFE REMAINS FAMILY CENTERED

While in some Ultimate Consumers, later marriage, smaller families, and rising divorce rates have taken their toll, life in Spain is still family-centered. Household size in most European countries has dipped below three persons. In Spain it is expected to remain at 3.5 persons per household through 1990 and 3.2 persons per household through 2000, reflecting that the average household often contains three generations. Unmarried women remain in the arms of the family. In Spain, marriage usually does not take place until the breadwinner is firmly established and can provide a completely furnished household. Thus, men often do not marry until they reach age 30 or older.

SERVICES LAG

While the services industries employ the lion's share of workers in most of the Ultimate Consumers, they still employ less than half the labor force in Spain. Seventeen percent of the population are employed in agriculture, the highest among OECD countries except for Greece, Portugal, and Turkey.

> ***As a country with a relatively young population compared with other Ultimate Consumers, Spain's standard of living is one of the lowest in the Community.***

Unemployment rates reached 21 percent in Spain in 1986, the highest in the OECD. Entry level jobs are at a premium. Of all the unemployed in Spain, 39 percent are new job entrants. Among women, 59 percent of job seekers are new entrants to the labor market, reflecting the increased desire of women to go to work, especially before they marry.

Women who are married and have children are not as active in the job market. While nearly 30 percent of female workers between the ages of 15 and 24 are seeking work, only 7 percent of women between the ages of 25 and 44 are job hunting, reflecting the significant share of these women who have left the job market to marry and raise a family.

Thus, the country has a long way to go in

*See the November 1984 issue of **International Demographics** for in-depth consumer information about Spain. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

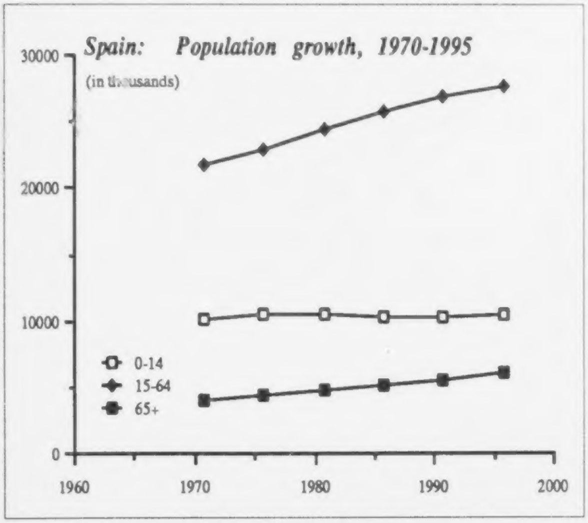
building an adequate employment base to provide the jobs that its relatively young population requires and to open new opportunities for women--especially the young--who wish to work outside the home.

Production and related workers are the largest occupational group in Spain. Professional and technical workers are 7.5 percent of the workers and administrative, executive, and managerial occupations add only 1.4 percent.

CONSUMER DURABLES

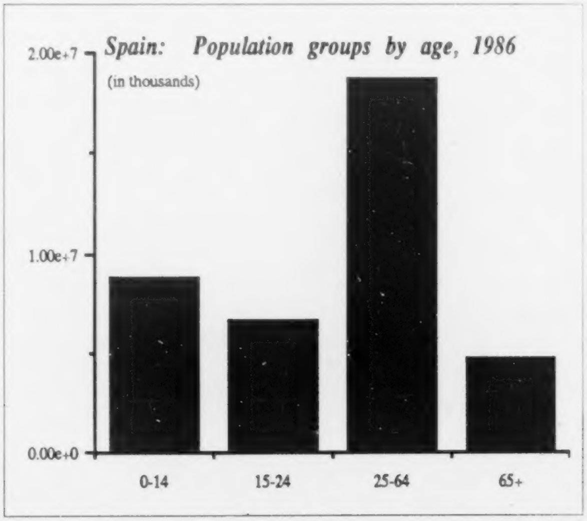
Spain is not a market for frozen convenience foods and will probably not be a growth market for labor-saving devices for several years. While 94 percent of households have a refrigerator, only 13 percent of households have a deep freeze. Only 1 percent of households have a microwave oven, a similar share to most other OECD countries. Coffee and tea makers are relatively rare in households compared with other OECD countries. There should be growth in basic appliances and packaged goods as employment gains and more women enter the workforce.

The Spanish do not spend as much on housing and utilities as some of their European neighbors. Only 13 percent of a household's budget goes to this necessity, whereas some more northerly countries spend 20 percent of their household budget on housing. Food, beverages, and tobacco, however, take a larger percentage--30 percent of the household budget, 28 percent of which is spent on food. Transportation and communication takes only 12 percent of the household budget, compared with some other countries where the two-car household and a telephone in every household is more usual. Spending on recreation, entertainment, education, and cultural services has actually decreased in the past few years. In 1978, it took 7.4 percent of the household budget. By 1983, that had decreased to 6.5 percent. Spending on furniture and household furnishings has also decreased. These two items no doubt reflect the effects of high unemployment and deep recession and should bounce back within the next two years.



Spain: Population growth, 1970-1995

(in thousands)



Spain: Population groups by age, 1986

(in thousands)

take a quick look at Spain

POPULATION

Total population (estimated 1986) | **38,792,177**
Rate of population growth (percent) | **0.54**
Lifetime births per woman (total fertility rate) | **1.74**
Birthrate (births per 1,000) | **12.85**
Death rate (deaths per 1,000) | **8.12**
Population under 15 (percent) | **22.7**
Population aged 65 plus (percent) | **12.1**
Median age | **30.9**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.3**
Number of persons per square kilometer | **77**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **74/80**
Infant mortality rate (number per 1,000 live births) | **12.1**
Population per physician/per nursing person | **360/280**
Daily calorie supply per capita (calories per person per day) | **3,237**

Education

Percent literate (male/female, total percentage) | **93/83, 88**
Number enrolled in secondary education as percentage of age group (male/female) | **86/90**
Number enrolled in higher education as percentage of population aged 20-24 | **24**

Labor force

Percent of labor force in agriculture/industry/services | **17/37/46**
Percentage of population of working age (aged 15-64) | **64**
Age-dependency ratio | **55.6**

STATUS OF WOMEN

Labor force participation rate (percent) | **33**
Number enrolled in secondary education as percentage of age group | **90**
Percent of women aged 15-49 using contraceptives | **51**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **77/23**

Population of major metropolitan areas

city name | **Madrid 3,188,217**

city name | **Barcelona 1,754,900**

Average annual growth in cities of 20,000 or more (percent) | **1.6**

Average annual growth in rural areas (percent) | **-1.8**

Rate of total population growth (percent) | **5**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$4,440**

Switzerland

THE ULTIMATE CONSUMERS

While other European countries and the United States debate the problems of immigration, Switzerland entertains one of the largest proportions of foreign workers of any country in the world. Fifteen percent of the country's population come from somewhere else, and more than 20 percent of the labor force is made up of year-round foreign workers. One reason the Swiss may not be quite as concerned as the Americans or the West Germans is that most of their foreign workers are from neighboring European countries. They speak languages and have cultures and religions that are familiar to the average Swiss. Italians make up the largest group of foreign workers, followed by Spaniards, French, and Germans.

Aside from the foreign workers, there are no distinct ethnic or minority groups in Switzerland. The country relies on two languages--French and German--and the Swiss are required to learn more than one language in school. The country is about half Protestant and half Roman Catholic. It is common for Swiss couples to have different mother tongues and different religious beliefs, so thoroughly multicultural is the nation.

HEADING FOR ITS ROCKING CHAIR

Switzerland is still categorized as an Ultimate Consumer country but its low birthrates and rapidly aging population will move it into the Rocking Chair category at some time in the next five years.

Presently, people aged 0 to 14 and those aged 65 and over hold equal shares of the population--about 15 percent each. But, in just four years, projections show that the older group will have outdistanced the younger. By 1990, the group aged 65 and older is expected to be about 17 percent of the population, while the younger group will have declined to only 13.5 percent. And, by 1995, the imbalance will be even greater--19 percent for those aged 65 and older and only about 12 percent for those under age 14. Switzerland will soon face the problems of its neighbors.

> ***The Swiss GNP per capita is the highest in the world and its unemployment rate one of the lowest.***

The one factor that has slowed the growth of the aging as a share of the population in Switzerland is the presence of the foreign workers. But unlike some other countries, where foreign families contribute to the birthrate substantially, foreign workers in Switzerland tend to be primarily men and temporary workers--younger than their Swiss counterparts, but not making a contribution to birth statistics. Thus, the birthrate remains one of the lowest among European countries at 11.4 births per thousand.

AN AFFLUENT SOCIETY

The Swiss GNP per capita is the highest in the world and its unemployment rate one of the lowest. In 1986, The World Bank put the Swiss GNP per capita at $17,010. Its unem-

*See the July 1984 issue of **International Demographics** for in-depth consumer information about Switzerland. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

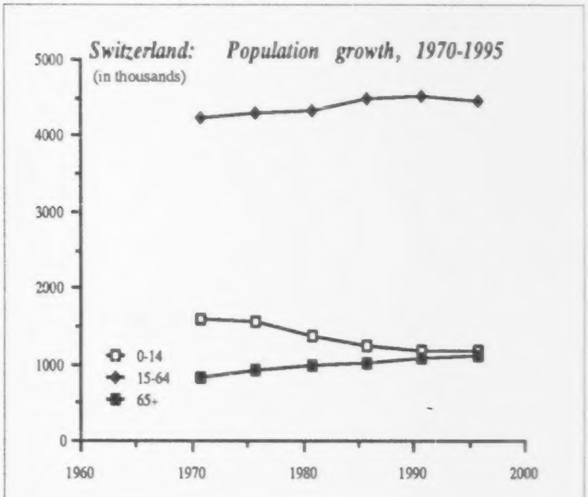
ployment rate is about 1 percent, another reason why there is less concern than in some other countries about foreign workers. About 37 percent of Swiss workers are women and nearly 50 percent of the eligible women in Switzerland participate in the workforce, thus making the two-income household a norm.

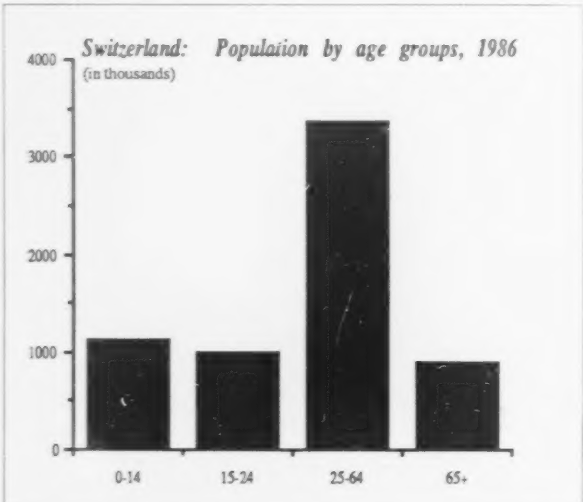
Despite Switzerland's reputation as a center for banking and other financial services, it still maintains strong agricultural and industrial sectors. While 55 percent of the labor force works in services (and Switzerland is highly dependent on tourism, which increases the number of service workers), nearly 7 percent are still employed in agriculture and fully 37 percent work in industry, manufacturing such products as chocolate, watches, and other precision instruments for which the Swiss are well-known.

The average Swiss manufacturing worker takes home 87.9 percent of his gross pay, when family benefits are included, but after taxes and social security deductions are taken out. This is about 10 percent more than in such countries as West Germany and Sweden and may account for the fact that the Swiss consumption of household goods is fairly high in comparison with some of their neighbors. The Swiss save about 4 percent of their disposable income.

SWISS CONSUMPTION

The high percentage of women working in Switzerland may contribute to its relatively high percentage of ownership of such appliances as refrigerators and food processors. While showing low rates of television ownership compared with other European nations (the topography of Switzerland makes it a prime candidate for cable television to ensure good reception), nearly 100 percent of households have radios and 85 percent of households have tape cassettes.





take
a
quick
look
at Switzerland

POPULATION

Total population (estimated 1986) | **6,551,551**
Rate of population growth (percent) | **0.334**
Lifetime births per woman (total fertility rate) | **1.52**
Birthrate (births per 1,000) | **11.40**
Death rate (deaths per 1,000) | **9.24**
Population under 15 (percent) | **17.0**
Population aged 65 plus (percent) | **14.5**
Median age | **36.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.7**
Number of persons per square kilometer | **154**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **78/74/81**
Infant mortality rate (number per 1,000 live births) | **6.2**
Population per physician/per nursing person | **390/130**
Daily calorie supply per capita (calories per person per day) | **3,472**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **65/74**
Number enrolled in higher education as percentage of population aged 20-24 | **23**

Labor force

Percent of labor force in agriculture/industry/services | **7/38/55**
Percentage of population of working age (aged 15-64) | **69**
Age-dependency ratio | **46.3**

STATUS OF WOMEN

Labor force participation rate (percent) | **50**
Number enrolled in secondary education as percentage of age group | **74**
Percent of women aged 15-49 using contraceptives | **70**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **58/42**

Population of major metropolitan areas

city name | **Zurich 839,939**

city name | **Basel 364,976**

Average annual growth in cities of 20,000 or more (percent) | **0.6**

Average annual growth in rural areas (percent) | **-0.4**

Rate of total population growth (percent) | **0.3**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$17,010**

Netherlands

THE ULTIMATE CONSUMERS

Because of its size, its location, and its independent spirit, The Netherlands has always been an outward-looking country. Global trade has historically been its forte, and Dutch businessmen look constantly for new opportunities. Not only do they reexport items they have finished, assembled, packaged or incorporated into their own products, but they also make extensive investments outside their own country. The Netherlands is more important in foreign trade than its population indicates.

Another plus for Americans who wish to work with Dutch businessmen is that most of them assume no one should be forced to learn Dutch, instead believing English is the language of international business. One indication of the strength of this conviction is the increasing number of students earning degrees in English--in 1981, 213 degrees in English were granted, up from 57 only 10 years before. Dutch businessmen are strategically oriented and follow trends to help them learn about new opportunities both in their own country and abroad.

WOMEN'S UPWARD MOVEMENT GOES AT A SLOW PACE

The Netherlands' age distribution, its devotion to education, its declining birthrate, its high degree of urbanization, and the Dutch reputation for highly individualistic behavior make one believe that its women would be economically active. However, the proportion of the labor force made up of women is similar to more rural and less sophisticated countries. Only about 34 percent of the labor force is female, and at least 17 percent of women work part-time. Part-time workers are especially prevalent in services such as restaurants and hotels, banking and insurance.

Between the ages of 15 and 24, men and women participate equally in the labor force--about 49 percent of each age group are working. However, between the ages of 25 and 49, 96 percent of men are in the labor force, but still only 49 percent of women. Between the ages of 50 and 64, 69 percent of men are working, but only 19 percent of women. And after age 65, 3 percent of men continue to work, but less than one percent of women stay in the labor force. While women are not as economically active as in some other Ultimate Consumers, their labor force participation has increased since 1971, when about 26 percent of them worked. Now, 40 percent of those aged 15 and older are in the labor force.

> ***While Dutch women are not as economically active as women in some Ultimate Consumer countries, they are entering the workforce in increasing numbers.***

Women do not obtain higher education at the same rate as men, although changes are in the wind. In 1970/71, only 14 percent of university degrees went to women. By 1981/82, 28 percent of degrees were earned by women.

Some professional fields appear to be more open to women. In 1971, only 21

*See the December 1985 issue of **International Demographics** for in-depth consumer information about The Netherlands. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

percent of the law degrees earned went to women, but by 1981 their share had decreased to 30 percent of law degrees. In medicine, 19 percent of the degrees earned went to women in 1971. By 1981, that share had declined to 21 percent of degrees earned.

While their participation at university is not as high as men's, women are more likely than men to earn a vocational degree. In 1982, 54 percent of vocational degrees were earned by men. But women are more apt to earn vocational degrees on a part-time basis. And, while men's vocational degrees are in such fields as technical, economic, and administrative training, women tend to earn their vocational degrees in teachers' training.

OLDER AGE GROUPS FASTEST GROWING

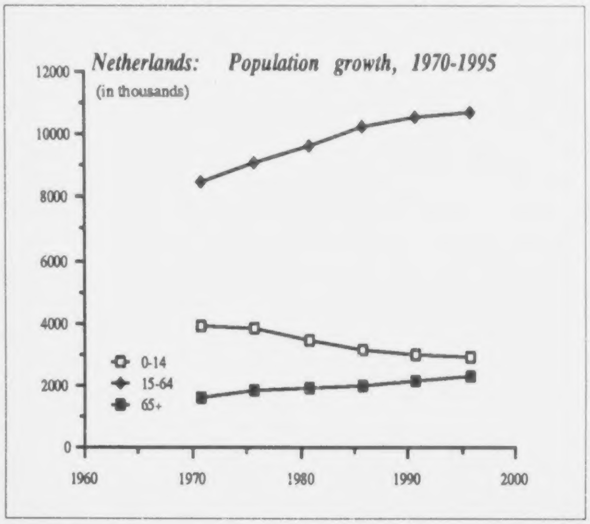
As in most of the Ultimate Consumers, women far outnumber men after age 55 in The Netherlands. Until then, their numbers are more in balance. About 19 percent of the population is aged 15 and under and nearly 12 percent is aged 65 and older. As in most developed countries, the age groups that are growing are 20 to 44 and aged 55 and over. The Netherlands is beginning to take a careful look at its health care policies in an attempt of accommodate its aging population.

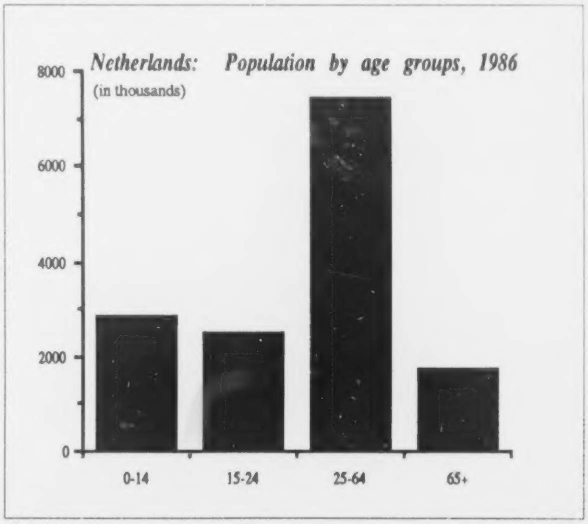
LEISURE CLASS TAKES TO RECREATION AND CULTURE

The middle-aged in The Netherlands appear to partake more in cultural and recreational activities now than they did in the mid-1970s. In 1974, 29 percent of persons aged 35 to 64 said they went to the ballet, concerts, opera, and so forth. By 1980, 36 percent of the same age group said they attend those events. Those who participated in swimming increased from 32 percent of the age group in 1974 to 44 percent in 1980. Listening to tapes, records, and cassettes increased from only 66 percent of 35-to-64-year-olds in 1974 to 78 percent of the age group in 1980. Participation in general sports activities increased from 19 percent to 29 percent of the 35-to-64-year-old group.

Among 18-to-34-year-olds, there were also increases in listening to records, tapes, and cassettes, signifying a continuing market for those items. The biggest increase in television watching was among those aged 65 and older. In 1974, 91 percent said they watched television. By 1980, 96 percent said they did so.

Bicycles are a significant means of transportation in The Netherlands. Surveys show that at least a quarter at all transportation for day trips away from home is by bicycle and that, even on short vacations, 10 percent of trips are by bicycle.





take a quick look at the Netherlands

POPULATION

Total population (estimated 1986) | **14,566,531**
Rate of population growth (percent) | **0.52**
Lifetime births per woman (total fertility rate) | **1.52**
Birthrate (births per 1,000) | **12.44**
Death rate (deaths per 1,000) | **8.50**
Population under 15 (percent) | **18.96**
Population aged 65 plus (percent) | **12.27**
Median age | **33**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **52.2**
Number of persons per square kilometer | **355**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **77/73/80**
Infant mortality rate (number per 1,000 live births) | **8.3**
Population per physician/per nursing person | **480/NA**
Daily calorie supply per capita (calories per person per day) | **3,477**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **97/93**
Number enrolled in higher education as percentage of population aged 20-24 | **31**

Labor force

Percent of labor force in agriculture/industry/services | **5/27/68**
Percentage of population of working age (aged 15-64) | **69**
Age-dependency ratio | **45.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **39.8**
Number enrolled in secondary education as percentage of age group | **93**
Percent of women aged 15-49 using contraceptives | **75**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **88/12**

Population of major metropolitan areas

city name | **Amsterdam 676,439**

city name | **Rotterdam 555,349**

Average annual growth in cities of 20,000 or more (percent) | **0.5**

Average annual growth in rural areas (percent) | **0.5**

Rate of total population growth (percent) | **0.5**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$9,520**

United States

THE ULTIMATE CONSUMERS

The sheer size of the United States --nearly 241 million people--and its relatively high standard of living make it an attractive target market for almost every product and service. But there are still demographic trends that make it more attractive for some products and services than for others.

MASS MARKET CHANGES

The United States of the 1950s offered a mass market. After World War II, Americans settled into home and family with a vengeance. They needed washing machines, refrigerators, cars, and other goods. If a neighbor's children ate Jello, a woman wanted Jello for her children too. White appliances and red Jello would do for everyone.

But as the society has grown and developed, meeting individual wants and desires has become the key to marketing. There can be two people, both aged 45, both earning $70,000. One will buy a Winnebago and the other will buy a Mercedes Benz sports car. The first satisfies a desire for recreation. The second satisfies a desire for status and adventure. Marketers no longer assume that everyone wants and needs the same goods and services.

UNDERSTANDING THE BABY BOOM IS CRITICAL

The baby boom in the United States occurred between 1946 and 1964. While other countries such as Japan and France also experienced baby booms, none was of the size or the length of the one in the United States. The effects of that baby boom are still felt throughout society. The approximately 75 million people who are part of the baby boom set the pace in work and play in the United States because they are such a large share of the population. In 1987, they are aged 23 to 41. They are out of high school. The members of the younger group are embarking on careers and looking for lasting relationships. The members of the older group are moving into middle age and middle management, reevaluating their lives, and, in most cases, entering the most productive and best-paid time of their lives. Despite the fact that the baby boomers are widely cast as being well-off, 9 million of them live in poverty.

> ***Seventy percent of baby-boom women are in the workforce.***

The movement of all the baby boomers into their most productive years as well as into the primary years for "pairing and nesting" means substantial growth in the demand for financial services and continuing education as well as for single family housing, household furnishings, and the other trappings of family life. The fact that 70 percent of baby-boom women are in the workforce reinforces the demand for many of these items.

TRENDS IN WOMEN'S LIVES MAKE THE DIFFERENCE

Since the advent of readily available birth control in the mid 1960s, women's lives in the United States have changed dramatically and with them have come changes in the lives of men and children.

First, the birthrate has dropped dramatically. The U.S. birthrate in 1955 was 24.9 births per thousand. By 1986, it had dropped to just over 15 births per thousand. Women are still mothers, but each woman is having fewer children, and devoting less of her time and energy to childrearing.

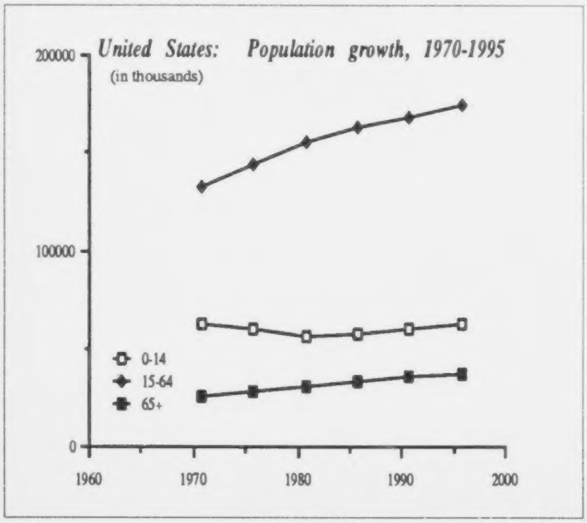
Second, women are better educated than ever before. In the United States 95 percent of young women are enrolled in high school and more than a fifth of high school graduates go on to college. Women in their 30s and 40s are increasingly returning to college to earn another degree or finish one they started. Once women have devoted two to four or more years of their life to higher education, they want to use their knowlege.

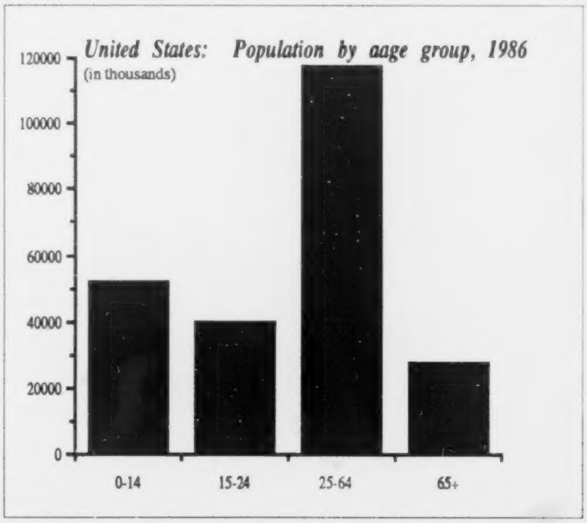
Fifty-five percent of women in the United States work at jobs outside their homes. The rate does vary slightly depending on their home situation. Among married women with children under age 6, 54 percent work. Among those with children aged 6 to 17, 68 percent work. Among married women with no children at home, 48 percent work. The majority of these women work because their families depend on their incomes to maintain the lifestyle they would like to live.

Having so many women at work has changed the way Americans live and opened up a whole spectrum of new products and services. Household cleaning services and laundries are once again in demand. Eating out has increased. Teenagers and men are increasingly responsible for household shopping, cleaning, and other chores once solely the work of women. Greater fragmentation is one of the results. In families who once ate the same meal--the one mother prepared--each member now chooses from a variety of entrees in the freezer or one family member buys Mexican take-out and another has pizza.

FRAGMENTATION

Niche marketing is the trend in the United States. Marketers must look not only at age and income, but also at lifestyles and attitudes to determine who their best potential customers are. The result seems to be an infinite opportunity to develop new products and services that fit the exact needs and wants of particular groups. Besides the opportunities offered by the fragmenting market, growth areas include health care, financial services, household services, personal electronic products, and women's business apparel.





take a quick look at USA

POPULATION

Total population (estimated 1986) | **240,856,000**
Rate of population growth (percent) | **0.9**
Lifetime births per woman (total fertility rate) | **1.8**
Birthrate (births per 1,000) | **15.7**
Death rate (deaths per 1,000) | **8.7**
Population under 15 (percent) | **21.6**
Population aged 65 plus (percent) | **12.2**
Median age | **31.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **51**
Number of persons per square kilometer | **66.6**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **71/78**
Infant mortality rate (number per 1,000 live births) | **10.6**
Population per physician/per nursing person | **455/169**
Daily calorie supply per capita (calories per person per day) | **3,450**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **95/95**
Number enrolled in higher education as percentage of population aged 20-24 | **23**

Labor force

Percent of labor force in agriculture/industry/services | **3/27/70**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **50**

STATUS OF WOMEN

Labor force participation rate (percent) | **54.5**
Number enrolled in secondary education as percentage of age group | **95**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **76/24**
Population of major metropolitan areas
    city name | **New York 7,165,000**
    city name | **Los Angeles 3,097,000**
Average annual growth in cities of 20,000 or more (percent) | **1.0**
Average annual growth in rural areas (percent) | **0.8**
Rate of total population growth (percent) | **0.9**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$15,475**

Union of Soviet Socialists Republic

THE ULTIMATE CONSUMERS

If the USSR were an open, middle-class market, it would be the most likely target for European and Asian countries which now zero in on the United States. The USSR, with a population of 281 million people, is larger than the United States, is growing at about the same rate, and is slightly younger. In comparison with Western European countries, it is considerably younger than most, growing more quickly, and it could offer a market that is almost as large as all of Western Europe combined.

Alas it is not to be. But an understanding of Soviet demographics is important because of its position as a world power and its trading potential for business-to-business and high-tech products.

ETHNIC MAKE-UP IS CHANGING

Most marketers want to know, at a minimum, the GNP per capita in a market. For the USSR, it is difficult to calculate some equivalent GNP in dollars, but the most recent figures from The World Bank for 1980 set the per capita GNP at about $4,190. Ranking all Eastern European markets in 1980, the GNP per capita in the USSR was lower than that calculated for East Germany, Czechoslovakia, and Hungary, but higher than that for Poland, Bulgaria, Romania, and Yugoslavia.*

Age distribution is important in any culture. In the USSR, the median age is 30.3 years, one year less than the median age in the United States, and 3 or 4 years less than most members of the Common Market. Despite its moderate median age, the USSR is a country of age extremes because of differences in the birth and death rates among ethnic groups.

Birthrates are dropping and death rates are rising slightly among European Russians--so-called Great Russians--causing that population to be in decline. At the same time, birthrates are substantially higher among people who live in the Moslem republics of Central Asia--so much so that in some parts of the Republic birthrates of the Central Asians are as much as triple those of the European Russians. When all ethnic groups are taken into account, Soviet women have 2.5 children on average, compared with about 1.9 children per woman in the United States.

European Russians who made up 52.4 percent of the population in 1979 are expected to decline to 46.7 percent of the population by the turn of the century, while Moslems, only about 16 percent in 1979, will increase to about 21 percent of the population.

The European Russians who made up 52.4 percent of the population in 1979 are expected to decline to 46.7 percent of the population by the turn of the century, while Moslems, only about 16 percent in 1979, will increase to about 21 percent of the population. Ukrainians, Balts, Belorussians, and other groups make up the rest. This shift in ethnic groups will also shift the make-up of recruits into the military as well as entry-level workers in the labor force.

For a full discussion, see **Dollar GNPs of the USSR and Eastern Europe, The World Bank, 1985.*

The differences in age distribution among ethnic groups, however, result in nearly half of the population being dependent on the labor force, a situation slightly less desirable than that usually found in Rocking Chair countries.

THE STATUS OF WOMEN

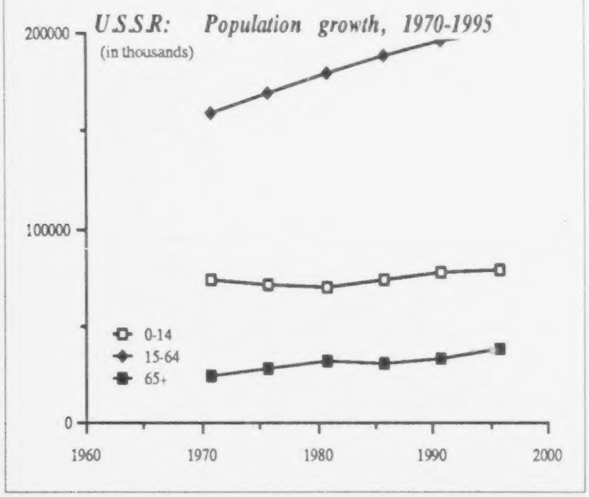
Much is made of the equal opportunities afforded to Soviet women, and women who are interviewed by the press are often scientists, physicians, or others in highly-skilled positions. However, while 82 percent of Soviet young men are enrolled in secondary school, only 77 percent of women are enrolled. At the same time, Soviet custom and necessity require everyone to have a job. But because women fall behind men in educational attainment, they are less competitive in the job market.

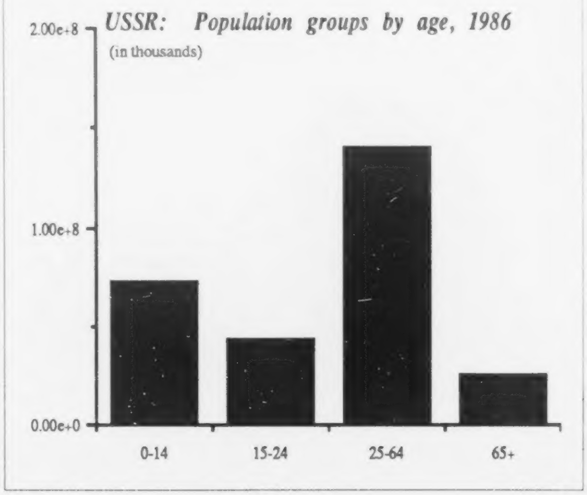
The lack of labor saving devices available to Soviet families means that women spend more than 30 hours a week on shopping and housework. Euromonitor has been able to collect statistics on ownership for only a few appliances. Euromonitor finds that 65 percent of Soviet households have a refrigerator, 55 percent have a washing machine, 38 percent have a television, and 40 percent have a radio. Data on other appliances are not available, but the percentage of households without a refrigerator is the highest among all European countries except for Romania and Bulgaria. Shopping then is almost a daily occurrence. Add food shortages to storage problems and it is apparent how much time must be spent involved with household chores.

A DECLINE IN HEALTH

The rising death rates in the USSR and the growing concern of politicians about the decline among the Great Russian population could allow one Western market force--health care--to have an impact in Russia. By and large, Western nations have taken advantage of medications that help to prevent strokes caused in part by high blood pressure. They have reduced cigarette smoking. In this area, the USSR lags way behind.

Men in the USSR are plagued by high levels of alcoholism, even though reported consumption figures do not show especially high levels of alcohol consumption per capita among the Soviet people as a whole.





take a quick look at USSR

POPULATION

Total population (estimated 1986) | **281,511,845**
Rate of population growth (percent) | **0.93**
Lifetime births per woman (total fertility rate) | **2.52**
Birthrate (births per 1,000) | **19.95**
Death rate (deaths per 1,000) | **10.70**
Population under 15 (percent) | **27.3**
Population aged 65 plus (percent) | **19.3**
Median age | **30.3**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.2**
Number of persons per square kilometer | **12**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **63/73**
Infant mortality rate (number per 1,000 live births) | **27.0**
Population per physician/per nursing person | **260/280**
Daily calorie supply per capita (calories per person per day) | **3,881**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **82/77**
Number enrolled in higher education as percentage of population aged 20-24 | **21**

Labor force

Percent of labor force in agriculture/industry/services | **20/39/41**
Percentage of population of working age (aged 15-64) | **66**
Age-dependency ratio | **51.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **67.1**
Number enrolled in secondary education as percentage of age group | **77**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **66/34**
Population of major metropolitan areas
    city name | **Moscow 8,546,000**
    city name | **Leningrad 4,832,000**
Average annual growth in cities of 20,000 or more (percent) | **1.9**
Average annual growth in rural areas (percent) | **-0.8**
Rate of total population growth (percent) | **0.93**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$4,190**

Yugoslavia

THE ULTIMATE CONSUMERS

As a pivotal country located on the edge of the Iron Curtain, governed by Communists, yet with a capitalistic nature, Yugoslavia walks a fine line. Its economic well-being, however, is highly dependent on its relationship with non-Communist countries. Among the Eastern Bloc countries, it is one of the few that looks westward rather than eastward. Keeping it turned in that direction is one of the reasons Western European governments include attention to Yugoslavia in their economic and social planning.

In 1983, 1.5 million Yugoslavians were resident in foreign countries. A million of them lived in Europe. They remitted $4.4 million a year in hard currency to their home country. In Yugoslavia remittances are the second most important source of hard currency after exports.

As the Western European countries have decreased their reliance on migrant labor, fewer Yugoslavians have opportunities in the European Community. Still, the ones who migrated at an earlier time continue to send remittances home. Those remittances were about 20 percent of current accounts receipts in 1985.

The World Bank estimated annual per capita GNP in Yugoslavia for 1983 at $2,490. Its preliminary estimate for 1984 declined to $2120. A World Bank study done in 1980 which attempted to quantify and compare incomes of the USSR and Eastern Europe gave Yugoslavia the lowest per capita GNP of the eight countries.

NEED FOR MODERNIZATION

Among other items, Yugoslavia's important exports include wine and textiles and apparel. Although it has a range of industries, many are old-fashioned and the country is not very export oriented. Its main task is to modernize the factories and make its manufacturing more competitive. This is especially important with the entry of Spain and Portugal into the European Community. These two countries share many characteristics with Yugoslavia, but they will now have the competitive advantage of EC membership.

> ***A World Bank study done in 1980 which attempted to quantify and compare incomes of the USSR and Eastern Europe gave Yugoslavia the lowest per capita GNP of the eight countries.***

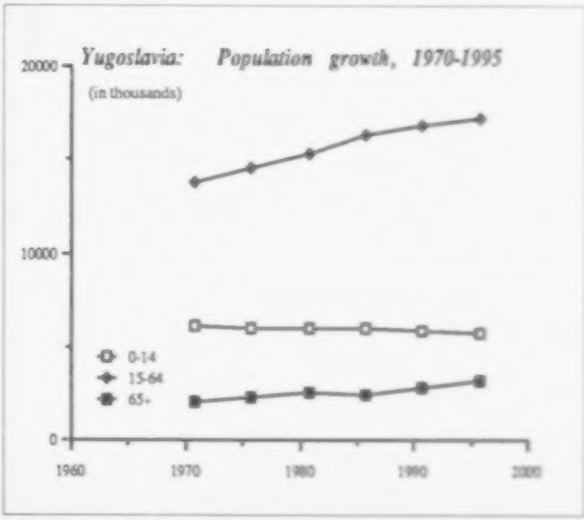
YOUNGER THAN THE REST OF EUROPE

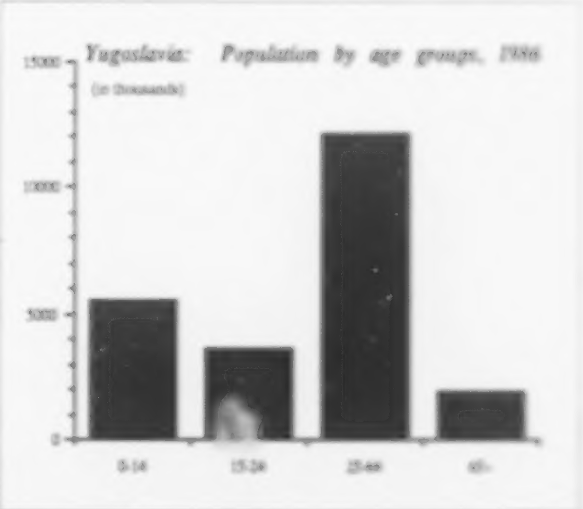
Like many other Mediterranean countries, Yugoslavia has a young age structure. Nearly 24 percent of its population are children aged 0 to 14. Only 8 percent of its residents--a very small percentage compared with other European countries--are aged 65 and over. Median age is 31 years. Life expectancy is still only 68 years for men and 73.5 years for women so the aging population will continue to grow slowly until general health conditions and health care improve in the country. Not until 1995 are those aged 65 and over expected to reach even 10 percent of the population.

Those of working age, on the other hand, continue to make up about 68 percent of the total population. These people will need jobs at home as the ability to find jobs as migrant laborers in nearby markets is diminishing. One way to provide new jobs is to modernize industry and expand export capability.

TOURIST INDUSTRY ON THE RISE

Tourism has grown strongly in recent years. In 1984, nights spent in accommodations increased by 19.6 percent over the prior year, the highest increase among all European countries. Receipts from tourism increased 46 percent in real terms between 1983 and 1984. In 1984, Yugoslavia had as many hotels as did Switzerland. It also had the most campsites of any of the Mediterranean countries except Italy. While countries such as Hungary and Poland attract the majority of their visitors from other Eastern European countries, the top contributors of tourists to Yugoslavia are West Germany, Italy, Austria, and the United Kingdom.





take a quick look at Yugoslavia

POPULATION

Total population (estimated 1986) | **23,277,531**
Rate of population growth (percent) | **0.67**
Lifetime births per woman (total fertility rate) | **2.05**
Birthrate (births per 1,000) | **15.82**
Death rate (deaths per 1,000) | **9.17**
Population under 15 (percent) | **23.7**
Population aged 65 plus (percent) | **8.6**
Median age | **31.6**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.4**
Number of persons per square kilometer | **91**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **68/74**
Infant mortality rate (number per 1,000 live births) | **26.7**
Population per physician/per nursing person | **670/300**
Daily calorie supply per capita (calories per person per day) | **3,575**

Education

Percent literate (male/female, total percentage) | **92/86, 89**
Number enrolled in secondary education as percentage of age group (male/female) | **86/80**
Number enrolled in higher education as percentage of population aged 20-24 | **20**

Labor force

Percent of labor force in agriculture/industry/services | **32/33/34**
Percentage of population of working age (aged 15-64) | **67**
Age-dependency ratio | **46.8**

STATUS OF WOMEN

Labor force participation rate (percent) | **26**
Number enrolled in secondary education as percentage of age group | **80**
Percent of women aged 15-49 using contraceptives | **55**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **46/54**
Population of major metropolitan areas
city name | **Belgrade 1,470,073**
city name | **Zagreb 768,600**
Average annual growth in cities of 20,000 or more (percent) | **2.5**
Average annual growth in rural areas (percent) | **-0.7**
Rate of total population growth (percent) | **0.67**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$2,490**

THE ROCKING CHAIRS

Europe is soon to become an old folk's home. The rocking chairs are already filled in Denmark, Sweden, West Germany, and the United Kingdom. But after the turn of the century, when the children of the baby-boom begin to enter the ranks of the elderly, the real geriatric boom will take off in the highly industrialized countries.

At present, the proportion of those over 60 in the populations of the Rocking Chair countries--Denmark, Sweden, West Germany, and the United Kingdom--all top 19 percent of the total population. By the year 2000, the elderly will make up about 20 percent of the populations of these Rocking Chair countries, with their share expec[illegible] to jump by 2025 to 29.8 percent in Denmark, 29.5 percent in Sweden, 27.4 percent in West Germany, and 25.4 in the United Kingdom.

Aging will be expensive for the industrial world. With population growth static or even drastically declining and the number of pensioners increasing, a shrinking workforce will have to pick up a bigger and bigger bill for pensions. Restrictive immigration policies of today may well look odd to hard-pressed future generations of workers. Even if robots take up some of the slack, the Rocking Chair countries and those soon to be will need someone to do their work. Asians and North Africans are likely migrants.

THE MATURE MARKET

Aging takes on particular significance in light of the fact that age and income are the two most important demographic characteristics in determining what a person will buy. The products and services that people are most likely to purchase are often related to their age. Older West Germans, for example, are a good market for vacation travel and health care products.

Income trends are also vital in understanding a market's potential. Factors such as whether or not persons must themselves finance their retirement, the need for sheltered housing, health care costs, and the level of government social security and support service expenditures need to be considered. Drawing conclusions about the purchasing power of the elderly by looking at income statistics alone is risky. Often retired households are a better market than they first appear due to fewer people in the household, lower financial obligations, and the tendency to have a variety of noncash benefits.

Changes lie ahead in the purchasing behavior of mature households as more educated, more moneyed middle-aged people enter the ranks of the elderly. Increasing incomes and rising levels of education should bring their consumption patterns more into line with those of younger consumers.

AGING AND THE ECONOMY

Every age group in the Rocking Chair countries is affected by aging. The shifting relative weight of the elderly is accompanied by changes in the age structure of the populations of children and persons of working age. The importance of children decreases and attention to older persons in the working-age population increases. As a population ages, smaller numbers of economically active people must support increasing numbers of retired persons. In 1980, the number of persons available to support one retired person, or the number of persons of working age (15 to 59) per person in the 60-plus age group, was 3.1 in Denmark, 2.7 in Sweden, 2.9 in the United Kingdom, and 3.3 in West Germany. By 2025, there will only be 2.2 working-aged people available to support one retired person in Denmark, 2.2 in Sweden, 1.9 in the United Kingdom, and 1.9 in West Germany.

Increasing real dependency rates among the elderly affect such socioeconomic development variables as manpower availability and productivity, the allocation of national budgets, and general patterns of consumption, investment, and savings. All these variables in turn influence the rate of economic growth of a country. In countries with well-developed social security systems, the members of the labor force must bear the burden of increased outlays in the national budget for pension and social service expenditures. In addition, the burden of supporting long-lived parents in countries with traditionally small completed family sizes is distributed among fewer children.

WHY POPULATIONS AGE

Declining fertility is the most influential factor in the population aging process. Decreases in mortality play a secondary role. When fertility levels fall and low mortality rates remain constant, population growth slows and the relative size of the adult population increases.

Declining fertility rates since the 1960s have left all of the Rocking Chair countries with below-replacement reproduction. A fertility rate of about 2.1 children per woman is considered to be at replacement level as it allows a couple to replace themselves, given an allowance for some mortality in childhood.

Sweden's total fertility rate of 1.6 births per woman and the United Kingdom's rate of 1.7 births per woman place them well below replacement level. However, the world's lowest recorded levels in modern history belong to West Germany and Denmark. West Germany and Denmark, both with fertility rates of 1.4 births per woman, fall more than 30 percent below replacement level. In these countries, the number of women in a particular generation will not be replaced by the same number of daughters in the next generation. One hundred women will have only 130 to 140 live-born children whereas 210 are needed to guarantee a stationary population.

WHAT LIES AHEAD

A return to replacement-level fertility in any Rocking Chair country is not expected under the present socioeconomic and cultural conditions. In fact, the experiences of these countries are seen as the wave of the future for the highly industrialized countries--the Ultimate Consumers. With the individual's or couple's needs satisfied with one or two children in these societies, current fertility behavior is expected to continue even in light of the fact that without relying on immigration, a society needs many families of three children to perpetuate itself.

All of the following Ultimate Consumer countries are slated to join the ranks of the Rocking Chairs by the year 2000: Austria, Belgium, Canada, Finland, France, Greece, Italy, Japan, Luxembourg, The Netherlands, New Zealand, Norway, Spain, Switzerland, Yugoslavia, the USSR, and the U.S.

The specter of resultant social tensions attending rapid population aging now troubles government planners. Assimilating foreign workers presents a major task. In addition, new government responses are needed for pension insurance reform, rising health costs, and education deployment. Family policy must remove obstacles preventing couples from having more than one child. More equitable taxation, easing the reemployment of mothers who have left the workforce for childrearing, and providing services that allow women to remain in the workforce while raising children are positive options for reconciling women's emancipation with the possibility for women to have several children.

Denmark

THE ROCKING CHAIRS

Denmark's population is already one of the world's oldest. And its aging process has just hit its stride. Its already disproportionate number of old people will grow more so in the future. By the year 2020, only two Danes will be available to support one elderly person. About 30 percent of its population will be over 60.

This trend necessitates new market strategies to reach consumers of higher ages. How the elderly use their leisure time and cope with overcoming the loneliness of old age are important considerations in marketing to a graying society.

HIGH DISPOSABLE INCOME

Denmark's 1986 population of about 5.1 million people is expected to remain relatively stable until the year 2000 and then decline to about 4.8 million in 2020. Yet, what Denmark lacks in population is made up for in disposable income. Per capita GNP in 1981 was $12,790 (compared to $12,530 for the U.S.)--the tenth highest per capita GNP recorded. The combination of extensive social welfare benefits and high per capita GNP results in high disposable household incomes.

Denmark's high percentage of women at work contributes greatly to its high disposable income. In 1983, a higher percentage of married women worked in Denmark than in any other rocking chair country or any of the European Community countries.Thirty-nine percent of all married women worked, as compared to only 15 percent in West Germany, 29 percent in the United Kingdom, and 22 percent of all married European Community women. Denmark also had the largest proportion of all women in the population working, 49 percent as compared to only 25 percent in West Germany.

> ***In 1983, a higher percentage of married women worked in Denmark than in any other Rocking Chair country or any of the European Community countries.***

GROWING PROPORTIONS OF ELDERLY

Denmark's positive annual growth rate (consistently under 1 percent since the 1950s) will become negative in the period 1990-1995, averaging about -0.02 percent annually. Denmark's total fertility rate of 1.4 children per woman is well below the 2.1 children per woman needed for natural replacement of the population. Low fertility is in part due to Denmark's high average age at first marriage, 28 for men and 25 for women, as compared to 25 for American men and 22 for American women.

Although population growth in Denmark will be static for the next 15 years at which point it will begin to gradually decline, persistent alterations in the age structure will result in a growing proportion of elderly people in society. Danes over 60, accounting

See the November 1983 issue of ***International Demographics*** *for in-depth consumer information about Denmark. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

for 19.3 percent of the total population in 1980, are expected to make up 20.6 percent of the total population by the year 2000 and nearly 30 percent by 2025.

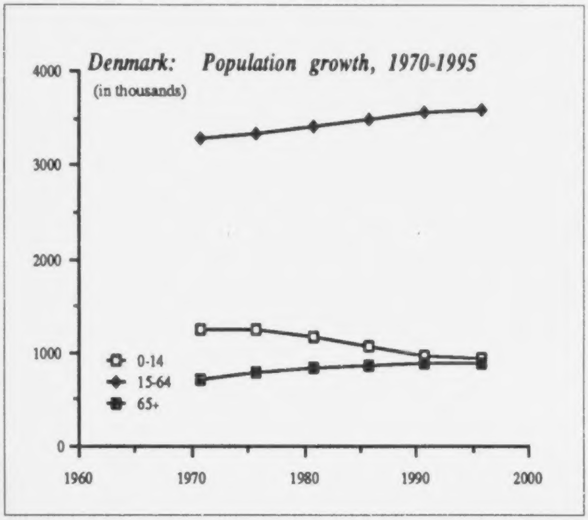
This shifting relative importance of the elderly is accompanied by a decrease in the importance of children. Those under 14, accounting in 1980 for about 21 percent of the population, will make up only 16 percent of the population in the year 2000 and 14 percent by the year 2020. The proportion of those of working age (15 to 59 years of age) will increase from about 60 percent of the total population in 1980 to 63.4 percent in the year 2000, but return to a lower figure of about 58 percent of the total population in 2020.

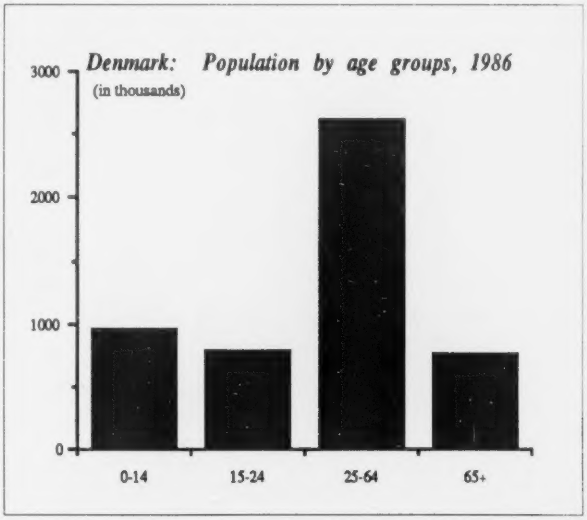
Due in part to Denmark's aging population structure, the composition of Danish households is changing. And, because Danes are marrying later in life, increasingly choosing to live together without marriage, and divorcing in increasing numbers, the "typical" Danish household is changing. In 1960, 7 percent of all households were one-person households. By 1970, this proportion had risen to 9 percent, and by 1980 to 12 percent. Single-parent households, which accounted for 4 percent of all households in 1960 and 1970, increased to 6 percent by 1980.

The "typical" nuclear family of a couple with children, which made up 57 percent of all households in 1960, fell to 52 percent of all households by 1970 and 50 percent of all households by 1980. The proportion of childless couples increased from 14 percent in 1960 to 18 percent in 1980, reflecting the rise in average age of first marriage.

WOMEN ON THE WAY UP

Denmark departs notably from its Rocking Chair counterparts of West Germany and the United Kingdom in its broad acceptance of the changing role of women in society. Not only does a higher percentage of women work in Denmark than in West Germany or the United Kingdom, but the Danish public gives these women at work a stronger vote of confidence than West Germans and Britains give their women workers. An overwhelming majority of Danes expressed equal confidence in women and men carrying out such traditionally male occupational activities as driving a bus, doctoring, and holding a seat in parliament in a 1983 OECD survey on the situation of women. Eighty percent of Danes polled expressed such confidence, as compared with only 46 percent of West Germans and 62 percent of the British. A higher percentage of Danes also favored strict equality in sharing household duties than did West Germans or Englishmen--46 percent of Danes as compared with 26 percent of West Germans.





take a quick look at Denmark

POPULATION

Total population (estimated 1986) | **5,118,046**
Rate of population growth (percent) | **0.07**
Lifetime births per woman (total fertility rate) | **1.47**
Birthrate (births per 1,000) | **10.81**
Death rate (deaths per 1,000) | **11.43**
Population under 15 (percent) | **18.0**
Population aged 65 plus (percent) | **15.26**
Median age | **35.9**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.4**
Number of persons per square kilometer | **119**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **75/72/78**
Infant mortality rate (number per 1,000 live births) | **NA**
Population per physician/per nursing person | **420/140**
Daily calorie supply per capita (calories per person per day) | **3,525**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **100/100**
Number enrolled in higher education as percentage of population aged 20-24 | **29**

Labor force

Percent of labor force in agriculture/industry/services | **7/27/66**
Percentage of population of working age (aged 15-64) | **67**
Age-dependency ratio | **50.6**

STATUS OF WOMEN

Labor force participation rate (percent) | **74**
Number enrolled in secondary education as percentage of age group | **100**
Percent of women aged 15-49 using contraceptives | **63**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **86/14**
Population of major metropolitan areas
city name | **Copenhagen 1,372,019**
city name | **Arhus 182,645**
Average annual growth in cities of 20,000 or more (percent) | **0.4**
Average annual growth in rural areas (percent) | **-2.2**
Rate of total population growth (percent) | **0.07**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$11,170**

Sweden

THE ROCKING CHAIRS

Having a sizeable elderly population is nothing new to Sweden. As far back as 1960, 17.3 percent of its population was over 60. Only West Germany had a higher proportion of elderly, at 20.2 percent of its population. Now, although West Germany has more senior citizens, Sweden holds the dubious distinction of having the highest proportion of old people in its population of any country in the world. Nearly 22 percent of Swedes in 1980 were over 60, as compared with 19.6 percent of West Germans, 19.3 percent of Danes, and 19.8 percent of the British.

FEWER BABIES, MORE OLD FOLKS

Future projections see Sweden aging much like Denmark, with the proportion of those over 60 rising to about 22.5 percent in the year 2000, and then leaping to almost 30 percent of the population in 2025. The proportion of those under 15 will drop sharply from 19.6 percent of the population in 1980 to 15.5 percent in the year 2000, thereafter leveling off at about the same percent until 2025.

Sweden's population grew steadily but slowly, from about 7 million in 1950 to its 1986 population of about 8.37 million. Sweden's population is expected to decline from this high to 8 million in the year 2000 and 7.5 million in 2025, due to declining fertility rates. In 1950, total fertility stood at about 2.2 children per woman, just above replacement level. During the period 1970 to 1975, Sweden's fertility rate dipped below replacement level to 1.89 children per woman. The current level of 1.73 children per woman is one of the world's lowest. A return to replacement-level fertility rates is not expected under current socioeconomic and cultural conditions. By the year 2000, the fertility rate is expected to rise slightly to 1.5 children per woman.

Although West Germany has more senior citizens, Sweden has the highest proportion of old people in its population of any country in the world.

Sweden's fertility rate remains way below replacement level despite government policy making it easy for working women to have children. Working women in Sweden desiring a family have the best deal now available worldwide.

In an effort to remove obstacles preventing couples from having more than one child, Sweden allows working mothers to take 52 weeks of maternity leave of which 38 weeks are paid at 90 percent of the recipient's salary. The recipient even can be the father if the family decides that it is best for him to stay with the baby and the mother return to work.

HIGH PROPORTION OF ONE-PERSON HOUSEHOLDS

Sweden has the highest proportion of one-person households of all the Rocking Chair countries and all other European Community countries as well. One-person households

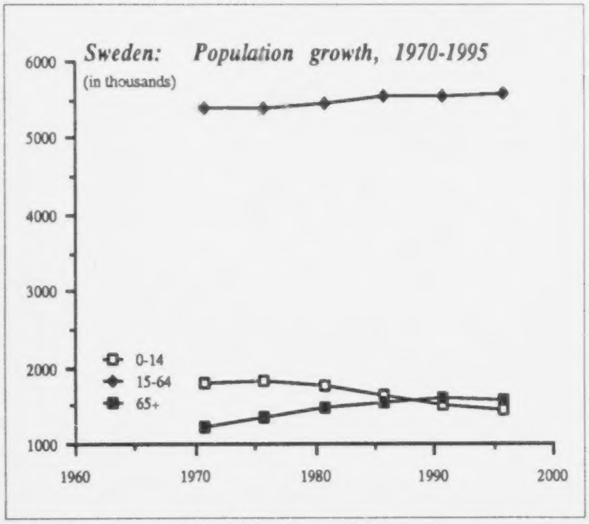
See the November 1983 issue of ***International Demographics*** *for in-depth consumer information about Sweden. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

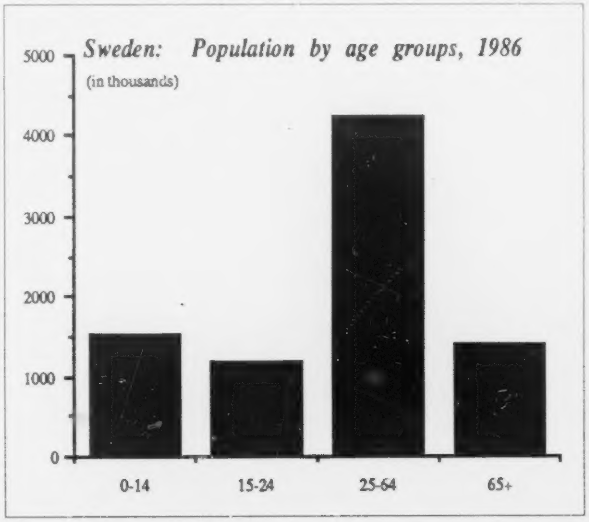
accounted for 26 percent of all Swedish households in 1980. Only France (24 percent), Luxembourg (21 percent), and the Netherlands (22 percent) had comparable proportions. Forty-two percent of Swedish households were made up of a couple with children in 1980; 26 percent were made up of childless couples; and 6 percent were single-parent households.

SEVENTH HIGHEST PER CAPITA GNP IN THE WORLD

Sweden boasts the highest per capita GNP in Scandinavia and the seventh highest per capita GNP in the world. At $14,500 in 1981, Sweden's GNP topped the U.S. figure of $12,530. It comes as no surprise then that in 1980, 68 percent of Swedes owned cars; 67 percent, washing machines; 23 percent, dishwashers; 97 percent, TVs (of which 78 percent were color TVs); refrigerators, 96 percent; and deep freezers, 68 percent.

In 1984, about 25 percent of private consumption expenditures went to purchasing food, beverages, and tobacco. Clothing and footwear took up 7.1 percent of total household expenditures; gross rent, fuel, and power, 26 percent; furniture, furnishings, household equipment and operations, 6.5 percent; medical care and health expenses, 1.6 percent; transport and communications, 15.2 percent; recreation, entertainment, and education, 9.5 percent; miscellaneous goods and services, 8 percent; and direct purchases abroad by resident households, 3.7 percent.


Sweden: Population growth, 1970-1995
(in thousands)


Sweden: Population by age groups, 1986
(in thousands)

take a quick look at Sweden

POPULATION

Total population (estimated 1986) | **8,370,812**
Rate of population growth (percent) | **0.16**
Lifetime births per woman (total fertility rate) | **1.73**
Birthrate (births per 1,000) | **11.75**
Death rate (deaths per 1,000) | **11.36**
Population under 15 (percent) | **17.6**
Population aged 65 plus (percent) | **17.9**
Median age | **37.5**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **46.97**
Number of persons per square kilometer | **19**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **77/74/80**
Infant mortality rate (number per 1,000 live births) | **6.5**
Population per physician/per nursing person | **410/100**
Daily calorie supply per capita (calories per person per day) | **3,115**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **81/90**
Number enrolled in higher education as percentage of population aged 20-24 | **39**

Labor force

Percent of labor force in agriculture/industry/services | **5/30/65**
Percentage of population of working age (aged 15-64) | **65**
Age-dependency ratio | **54.3**

STATUS OF WOMEN

Labor force participation rate (percent) | **77**
Number enrolled in secondary education as percentage of age group | **90**
Percent of women aged 15-49 using contraceptives | **78**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **83/17**
Population of major metropolitan areas
city name | **Stockholm 650,952**
city name | **Goteborg 424,186**
Average annual growth in cities of 20,000 or more (percent) | **0.2**
Average annual growth in rural areas (percent) | **-0.3**
Rate of total population growth (percent) | **0.15**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$11,860**

United Kingdom

THE ROCKING CHAIRS

Since 1971, the population of the United Kingdom has remained fairly constant, hovering around 56 million. Slow growth is projected for the years up to the end of the century, from 56.5 million in 1986 to 57.7 million in 2001 due to a rise in births until the mid-1990s followed by a fall. However static the total, the age structure of the population will continue to undergo important changes, with the proportion of children under 15 falling and the proportion of those over 60 rising.

Aging is nothing new to Britain. Since 1951, the number of elderly has grown by over 2 million. The proportion of those over 60 leapt from 16.8 percent of the total population in 1960 to 19.8 percent in 1980. Although the aging of Britain will continue, it will slow considerably, with the proportion of those over 60 growing to only about 20 percent of the total population by the year 2000.

Although the aging of Britain is slowing down due to low birthrates in the late 1920s and 1930s, the balance of different age groups in the 65 plus group is expected to change dramatically. The proportion of those aged 65 to 74 is expected to decrease from 57 percent of those aged 65 and over in 1984 to 53 percent by the year 2001, while the proportion of those aged 85 and older jumps from 8 percent of the elderly in 1984 to 11 percent in 2001. As those aged 85 and older lead more restricted lives than their more youthful counterparts, serious problems will arise for health care providers.

MORE SPENDING POWER FOR THE ELDERLY

Not only are there more elderly people in the U.K., but they have more to spend. Disposable income per household head aged 65 or over nearly tripled since 1951 in real terms, as compared with an increase of only two-thirds for those below pension age. Income per head has risen from about 40 percent to 70 percent of non-pensioners.

> ***Aging is nothing new to Britain. Since 1951, the number of elderly has grown by over 2 million.***

Pensioners' incomes are made up of national insurance (NI) pension, occupational pensions, and income from their own savings and investments. Most elderly people qualify for NI, and a majority retire with a pension from their current or previous employer. The growing value of NI and occupational pensions compared with average take-home pay along with improved social security benefits in the areas of housing and disability has put more pounds in the pockets of the retirees relative to non-pensioners.

The younger a pensioner is, the more likely he is to have extra pounds to spend. Of those aged 60 and over, the youngest--those in the age groups 60 to 64 and 65 to 69--tend to be

*See the April 1983 issue of **International Demographics** for in-depth consumer information about the United Kingdom. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

better off than those 75 or over due to the increased likelihood that they are still participating in the workforce (particularly in a part-time capacity) or that they have occupational pensions. In 1982, average disposable weekly income for those aged 60 to 64 was 96 pounds and 86 pounds for those aged 65 to 69, compared to 78 pounds per week for those 75 and over. Of the non-married, men consistently had more to spend than women. For all of pension age, men had 55 pounds per week in 1982 , compared to 49 pounds per week for women.

MORE BRITISH LIVE ALONE

Going it alone, whether by choice or out of necessity, is a lifestyle more and more Englishmen are taking up. One-person households jumped from17 percent of all households in 1971 to 25 percent in 1984. And, although the proportion of the elderly living alone rises steadily with age, this jump was not solely caused by greater numbers surviving into old age as widows and widowers. The proportion of those 16 to 24 and 25 to 44 living alone more than doubled over the period

In 1984, 3.4 percent of those aged 16 to 24 lived alone, as compared to only 1.5 percent in 1973. For those aged 25 to 44, 5.4 percent lived alone in 1984, up from 2.4 percent in 1973.

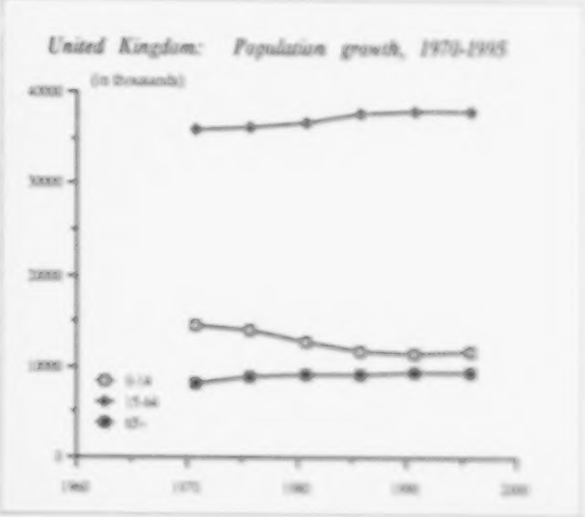
The likelihood of living alone increases with age. In 1984, of those aged 65 to 74, 28 percent lived alone. Of those over 75, nearly half lived alone.

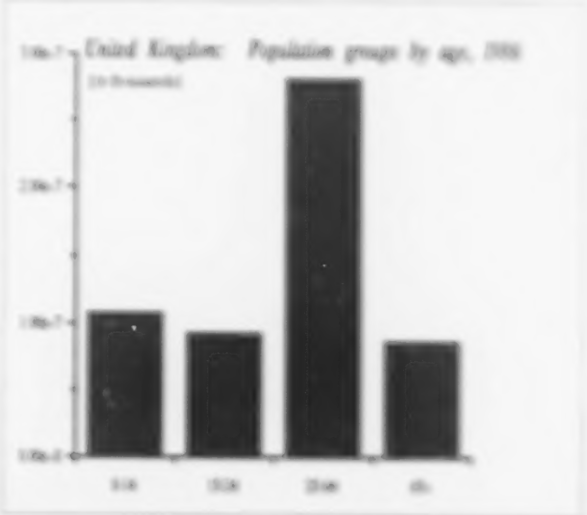
Average household size has fallen dramatically since the 1960s, from an average of 3.09 people per household in 1961 to an estimated 2.59 in 1984. Between 1971 and 1981, the total number of households increased by about 7 percent, while the population increased only 1 percent.

LEISURE TIME

How the aged spend their time is essential to marketers looking at a graying society. In 1985, retirees in the U.K. spent an average of 49.8 hours a week on essential activities such as shopping, eating meals, etc.; 60.2 hours sleeping (compared to a worker's 57 hours); and 58 hours on free-time activities, according to the General Household Survey. Retirees had about four times the free time of an average worker, and about twice that of an average housewife.

Of home-based activities for women, 32 percent listened to tapes and records, 37 percent gardened, 44 percent did needlework and/or knitting, 13 percent did home repairs, and 59 percent read books. Of home-based activities for men, 40 percent listened to records or tapes, 59 percent gardened, 39 percent did house repairs, and 51 percent read books.





take a quick look at United Kingdom

POPULATION

Total population (estimated 1986) | **56,757,440**
Rate of population growth (percent) | **0.15**
Lifetime births per woman (total fertility rate) | **1.79**
Birthrate (births per 1,000) | **13.39**
Death rate (deaths per 1,000) | **11.87**
Population under 15 (percent) | **19.0**
Population aged 65 plus (percent) | **15.2**
Median age | **35.1**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **47.8**
Number of persons per square kilometer | **228**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **72/78**
Infant mortality rate (number per 1,000 live births) | **9.5**
Population per physician/per nursing person | **680/120**
Daily calorie supply per capita (calories per person per day) | **3,226**

Education

Percent literate (male/female, total percentage) | **99/99, 99**
Number enrolled in secondary education as percentage of age group (male/female) | **81/84**
Number enrolled in higher education as percentage of population aged 20-24 | **20**

Labor force

Percent of labor force in agriculture/industry/services | **3/38/59**
Percentage of population of working age (aged 15-64) | **65**
Age-dependency ratio | **51.6**

STATUS OF WOMEN

Labor force participation rate (percent) | **56.5**
Number enrolled in secondary education as percentage of age group | **84**
Percent of women aged 15-49 using contraceptives | **77**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **92/8**

Population of major metropolitan areas

city name | **Greater London 6,754,500**

city name | **Birmingham 1,012,900**

Average annual growth in cities of 20,000 or more (percent) | **0.2**

Average annual growth in rural areas (percent) | **-2.1**

Rate of total population growth (percent) | **0.15**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$8,570**

West Germany

THE ROCKING CHAIRS

West Germany is the world's foremost old folks home. Its consistently falling fertility rate--from about 2.5 children per woman in the early 1960s to the world's lowest level of 1.31 children per woman in 1986--accounts for its disproportionate number of old people.

The world's 12th most populous country in 1985 will see its world ranking slip out of the top 20 by 2020 due to its declining population figures. The West German population is expected to decrease from its present 61 million to 58 million by the turn of the century and about 46 million 30 years later.

However, the expected decline in absolute population figures is less crucial than the alterations in the age structure and the resultant increase in the elderly population. In 1980, the proportion of those aged 60 and over in the total population was 18.7 percent.This proportion is projected to rise to 23.7 percent in the year 2000, 28.4 percent in 2020, and 30.5 percent in 2025.

Such a change in the age structure of a population results in an ever-increasing burden on the active population with respect to the cost of social security, health care, housing, and leisure activities for old people.

EASING THE BURDEN THROUGH IMMIGRATION

Populated by old people, West Germany will need someone to do its work. Even if increased robotization in manufacturing replaces some industrial workers, West Germany will need to increasingly rely on manual and health-service workers to care for its old. Current race-conscious immigration policies aside, many new workers are bound to be immigrants. Already, as a result of "temporary" labor migration policies of the labor-short 1960s, West Germany had 4.4 million resident aliens in 1983, of which 1.5 million were Turkish. Yugoslavs came next, numbering 613,000, followed by Italians, numbering 565,000; Greeks, 292,000; Austrians, 172,000; and Spaniards, 166,000.

> ***Tracking trends in household formation while West Germany ages can give businesses the opportunity to tap household and lifestyle niches by designing specialized products and services.***

Amid growing anti-immigrant feeling among West Germans, a recent report issued by Liselotte Funcke, the federal commissioner for the integration of foreigners, stated that the employment of foreigners will continue to be a significant economic factor. The report also states that the country's social security system would face serious problems even earlier than is now predicted if there were no foreign workers.

West Germany ranked tenth in the world for receiving immigrants during the period 1980-85, with about 40,000 migrants per year. The spectre of resultant social tensions attending rapid population aging now troubles government planners. Assimilating foreign workers presents a major task. In addition, new government responses are needed for

*See the July 1983 issue of **International Demographics** for in-depth consumer information about West Germany. Back issues are $16 each and are available by calling toll free, 800-828-1133; in New York call 800-462-8686.*

pension reform, rising health costs, and education deployment. West German economists predict that maintaining current benefits would mean pushing overall marginal tax rates for many middle-income families above 80 percent.

HOUSEHOLD AND LIFESTYLE MARKET NICHES

West Germany's population imbalance will drastically affect the economic sector, necessitating new market strategies. Fewer consumers and consumer groups of higher average ages, dwindling household size, and the presence of immigrant groups are factors needing consideration.

Tracking trends in household formation while West Germany ages can give businesses the opportunity to tap household and lifestyle niches by designing specialized products and services. In addition, purchasing behavior of retired households is expected to change as more educated and moneyed middle-aged consumers become retirees.

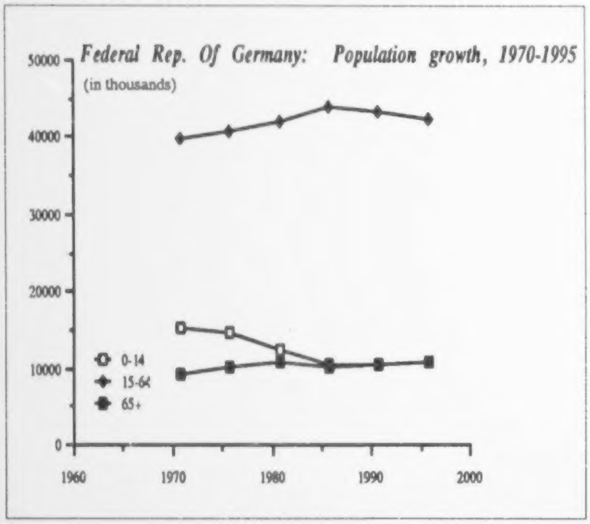
Households in West Germany increased from 22 million in 1970 to 25 million in 1981, with average household size dropping from 2.74 persons to 2.46 persons in the same period. One-person households increased from 25 percent to 31 percent of the total from 1970 to 1981.

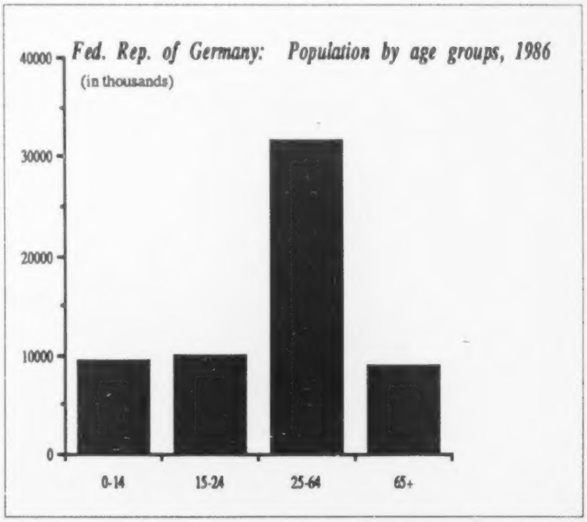
Married-couple households still predominated, however, accounting for 62 percent of West German households in 1981.

HIGHEST PER CAPITA GNP IN EUROPE

West German GNP per capita tops that of all other European countries. Average monthly household income amounts to about DM3,400 or about $1,395. Disposable income surpasses the equivalent of US$665 in 50 percent of all one-person households, according to a recent study of the Bonn Institute of Economic and Social Policy.

It is not surprising then to find that nearly 90 percent of middle-class households own electric coffee machines. Or that 97 percent of middle-class West Germans have televisions, 90 percent have telephones, and 96 percent own some kind of camera equipment. With 30 million telephones, only the U.S. and Japan have more telephones than West Germany. Middle-class households spent about 20 percent of their income on food, drink and tobacco in 1981. Another 8 percent went to clothing, 7 percent to household goods, and 5 percent to leisure goods. Almost 50 percent of expenditures were for services. High-income households spent only 14 percent on food and slightly more on leisure.





take a quick look at West Germany

POPULATION

Total population (estimated 1986) | **61,006,569**
Rate of population growth (percent) | **-0.03**
Lifetime births per woman (total fertility rate) | **1.31**
Birthrate (births per 1,000) | **9.97**
Death rate (deaths per 1,000) | **11.63**
Population under 15 (percent) | **14.8**
Population aged 65 plus (percent) | **15.0**
Median age | **37.7**
Number of women in fertile age group (aged 15-49 as a percent of all women) | **49.0**
Number of persons per square kilometer | **245**

SOCIAL INDICATORS

Health

Life expectancy at birth (number of years, male/female) | **75.5/72/79**
Infant mortality rate (number per 1,000 live births) | **8.1**
Population per physician/per nursing person | **420/170**
Daily calorie supply per capita (calories per person per day) | **3,475**

Education

Percent literate (male/female, total percentage) | **NA**
Number enrolled in secondary education as percentage of age group (male/female) | **93/90**
Number enrolled in higher education as percentage of population aged 20-24 | **30**

Labor force

Percent of labor force in agriculture/industry/services | **6/41/53**
Percentage of population of working age (aged 15-64) | **70**
Age-dependency ratio | **42.5**

STATUS OF WOMEN

Labor force participation rate (percent) | **49**
Number enrolled in secondary education as percentage of age group | **90**
Percent of women aged 15-49 using contraceptives | **NA**

URBANIZATION

Percent of total population in urban and rural areas (urban/rural) | **86/14**

Population of major metropolitan areas

city name | **West Berlin 1,860,500**

city name | **Hamburg 1,617, 800**

Average annual growth in cities of 20,000 or more (percent) | **0.1**

Average annual growth in rural areas (percent) | **-1.8**

Rate of total population growth (percent) | **-0.03**

ECONOMIC INDICATORS

Annual per capita GNP (US$) | **$11,130**

Appendix A.

List of 150 Countries and Where They Fit in International Demographics Clusters

Cluster Key:

1

THE DEPENDENTS

2

THE SEEKERS

3

THE CLIMBERS

Afghanistan	1
Albania	3
Algeria	1
Angola	1
Argentina	4
Australia	4
Austria	4
Bahrain	2
Bangladesh	1
Barbados	3
Belgium	4
Benin	2
Bhutan	1
Bolivia	1
Botswana	2
Brazil	3
Bulgaria	4
Burma	2
Burundi	1
Cameroon	2
Canada	4
Central African Republic	2
Chad	1
Chile	4
China	3
Colombia	3
Comoros	2
Congo	1
Costa Rica	3
Cuba	3
Cyprus	3
Czechoslovakia	4
Denmark	5
Dominican Republic	3
East Germany	4
East Timor	1
Ecuador	2
Egypt	2
El Salvador	[illegible]
Equatorial Guinea	1
Ethiopia	1
Fiji	3
Finland	4
France	4
Gabon	2
Gambia	1
Greece	4
Ghana	2
Guadeloupe	3
Guatemala	2
Guinea	1
Guinea-Bissau	1
Guyana	3
Haiti	2
Honduras	1
Hong Kong	4
Hungary	4
Iceland	4
India	2
Indonesia	2
Iran	1
Iraq	2
Ireland	4
Israel	4
Italy	4
Ivory Coast	2
Jamaica	4
Japan	4
Jordan	1
Kampuchea	1
Kenya	1
Korea, North	3
Korea, South	3
Kuwait	2
Lao People's Democratic Republic	1
Lebanon	3

4

THE ULTIMATE CONSUMERS

5

THE ROCKING CHAIRS

Lesotho	2
Liberia	1
Libya	1
Luxembourg	4
Madagascar	2
Malawi	1
Malaysia	2
Mali	1
Malta	3
Martinique	3
Mauritania	1
Mauritius	2
Mexico	3
Mongolia	2
Morocco	1
Mozambique	1
Namibia	1
Nepal	1
Netherlands	4
New Zealand	4
Nicaragua	2
Niger	1
Nigeria	1
Norway	4
Oman	1
Pakistan	1
Panama	3
Paraguay	2
Peru	3
Philippines	3
Poland	4
Portugal	3
Puerto Rico	3
Qatar	2
Reunion	3
Romania	4
Rwanda	1
Saudi Arabia	1
Senegal	1
Sierra Leone	1
Singapore	4
Somalia	1
South Africa	2
Spain	4
Sri Lanka	2
Sudan	1
Surinam	2
Swaziland	1
Sweden	5
Switzerland	4
Syria	2
Taiwan	3
Tanzania	1
Thailand	3
Togo	1
Trinidad and Tobago	3
Tunisia	2
Turkey	3
Uganda	1
United Arab Emirates	2
United Kingdom	5
Upper Volta	1
Uruguay	4
USA	4
USSR	4
Venezuela	3
Viet Nam	2
West Germany	5
Yemen Arab Republic	1
Yemen, People's Democratic Rep.	1
Yugoslavia	4
Zaire	1
Zambia	1
Zimbabwe	1

Appendix B.

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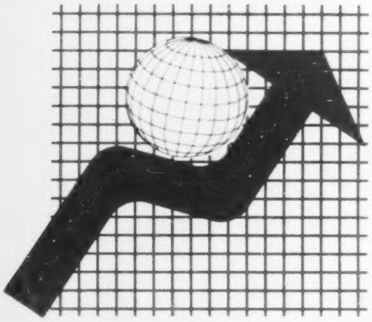

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